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ABSTRACT

This document contains validated activities and competencies needed by librarians working in a special library. The activities and competencies are organized according to the functions which special librarians perform: acquisitions; cataloging; circulation and user services; collection maintenance; interlibrary loan; management; reference; and serials control. Within each function, competencies are grouped under the categories of Knowledge, Skills, and Attitudes, and three professional levels are dealt with: entry level (0-3 years experience), mid-level (4-9 years experience), and senior level (10 or more years experience). (THC)

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**NEW DIRECTIONS IN LIBRARY AND
INFORMATION SCIENCE EDUCATION
FINAL REPORT
VOLUME 2.4
SPECIAL LIBRARIAN COMPETENCIES**

1984

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VOLUME TWO: SPECIFIC COMPETENCIES

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INTRODUCTION

This document contains validated activities and competencies needed by information professionals working in a special library. The following operational definition of competency was developed:

A competency is a generic knowledge, skill or attitude of a person that is causally related to effective behavior as demonstrated through external performance criteria, where:

- Knowledge is having information about, knowing, understanding, being acquainted with, being aware of, having experience of, or being familiar with something, someone, or how to do something.
- Skill is the ability to use one's knowledge effectively.
- Attitude is a mental or emotional approach to something, or someone.

We have identified several types of knowledge that are necessary to perform information work satisfactorily as follows:

- Basic knowledge in such areas as language, communication, arithmetic operations, etc.
- Subject knowledge of primary subject fields of users served such as medicine, chemistry, law, etc.
- Library and information work environments such as the information community, its participants and their social, economic and technical interrelationships, etc.
- Knowledge of what work is done such as the activities required to provide services and produce products, etc.
- Knowledge of the organization or user community served such as the mission, goals, and objectives of the user or the organization, user's information needs and requirements, etc.

There appear to be three kinds of skills necessary to perform information work satisfactorily including:

- Basic skills such as cognitive, communication, analytical, etc.
- Skills related to each specific activity being performed such as negotiation of reference questions, evaluation of search outputs, etc.
- Other skills such as managing time effectively, budgeting and making projections, etc.

Attitudes of information professionals are found to be extremely important to work performance. We have found it useful to subdivide attitudes into:

- Dispositional attitudes toward one's profession, the organization served, one's work organization, and other people such as users and co-workers.
- Personality traits/qualities such as confidence, inquisitiveness, sense of ethics, flexibility, etc.
- Attitudes related to job/work/organization such as willingness to accept responsibility, willingness to learn, desire to grow, etc.

The activities and competencies are organized according to the functions which information professionals perform, and by professional level as displayed in Figure 1. The competencies are cumulative across professional level, i.e., competencies of mid-level professionals include entries shown at the mid-level as well as those at the entry level, etc.

It is important to understand the distinction between functions performed and positions or job titles. Our rationale behind the functional approach was that we were more concerned with what information professionals do than with what they are called. In a single-person unit therefore, the information professional will undoubtedly perform more than a single function. In using and interpreting the competency data in this document, it is important to consider the functions being performed by

FUNCTIONS	ACTIVITIES		KNOWLEDGE		SKILLS		ATTITUDES	
	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future
	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL
	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL
	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL

Figure 1 Organization of Activities and Competencies

professionals and the activities being performed to determine which competencies are appropriate. The functions identified for information professionals working in special libraries are:

- acquisitions
- cataloging
- circulation and user services
- collection maintenance
- interlibrary loan
- management
- reference
- serials control.

Three professional levels were defined as follows:

- entry level (up to 3 years of professional experience)
- mid level (4-9 years of professional experience)
- senior level (10 or more years of professional experience).

The activities performed are listed first and numbered sequentially. The actual assignment of individual activities to subcategories of the major activities and to the functions varies from library to library. The organization of activities that we developed provided us with the "best fit" case. Indented and unnumbered activities are essentially paraprofessional activities which, in small libraries, may be performed by professionals.

The activities are followed by the validated sets of knowledge, skills and attitudes. Two versions of each of the lists are provided. The first set have those competencies designated by the validators as essential in bold face print, and those designated as desirable in regular face print. The level of emphasis is denoted by asterisks as follows:

- * denotes each competency rated as essential or desirable by 50-70 percent of the validators of that competency
- ** denotes each competency rated as essential or desirable by 71-84 percent of that validators of that competency

*** denotes each competency rated as essential or desirable by 85-100 percent of the validators of that competency.

The second set of knowledge, skills, and attitudes have competencies designated by the validators as becoming more or less important in the future. Again, the level of emphasis is denoted by asterisks as follows:

* denotes each competency rated by 1-20 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

** denotes each competency rated by 21-40 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

*** denotes each competency rated by 41-100 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

• denotes competencies rated as currently not applicable which have also been rated as becoming more important in the future.

SPECIAL LIBRARIAN COMPETENCIES
ACQUISITIONS

ACTIVITIES

ACQUISITIONS

ENTRY LEVEL

Selection

1. Develop a good understanding of the library's collection development policies and guidelines
2. Receive requests from organization staff for purchase of materials for the collection(s) or for office use
3. Forward orders for serials/numbered series to the serials control section
4. Select materials to order from publishers' catalogs, book reviews, bibliographies, circulation and interlibrary loan requests for materials not owned by the library, exchange lists, etc.
5. Forward bibliographic citations for selected serials/numbered series and any such materials received in the section to the serials control section for processing
6. Examine shipments of unsolicited materials (blanket orders/on-approval shipments, gifts, etc.) to select which items are suitable for retention; annotate processing slips for each item as required
7. Evaluate discarded office copies for possible addition to the library's collection(s)
8. Assign processing priorities to all material selected for the collection(s)
9. Maintain a statistical record of selection and the usefulness of various selection tools
10. Supervise bibliographic searching and verification:
 - search in-process file(s) (items on order, want lists, and received items not yet cataloged) and library's catalog(s) to determine if the cited titles are needed for the collection(s)
 - annotate citations that are discovered to be serials/numbered series and return them to supervisor
 - verify and locate additional bibliographic data, as required;
 - refer problems to supervisor
 - maintain record of searching and verification statistics
11. Search for trade and non-trade bibliographic information that technicians are unable to locate; refer problems to higher level staff, as appropriate

ACTIVITIES

ACQUISITIONS

ENTRY LEVEL

Selection (cont'd)

12. Determine source of procurement (jobber, direct, gift, exchange, etc.)
13. Prioritize recommended selections in each subject area; consult with mid level librarian to determine which materials should be placed on the want list for possible order action at a later date
14. Supervise order/request processing:
 - prepare records (manual or automated) for items to be ordered/
requested now/later
 - prepare purchase orders, if required
 - prepare order/request documentation for mailing
 - claim outstanding orders
 - cancel orders, as required
 - re-issue orders to different sources, as required
 - maintain statistical record of order/request processing operations

Receipt Processing

15. Supervise receipt processing of ordered/requested materials, blanket order/on-approval shipments, unsolicited gifts, etc.
 - open packages and retain sender information
 - check shipments against packing lists/invoices
 - check shipments for damage
 - examine received items for imperfections
 - for unsolicited shipments, search in-process file(s) and library's catalog(s) to determine which items are needed for the collection
 - update in-process file with receipt information
 - update in-process file re: any errors in receipt or receipt of damaged/imperfect materials
 - annotate packing slips/invoices for damaged/imperfect materials, incorrectly supplied materials, and unwanted materials
 - annotate packing slips/invoices to indicate materials which are office copies
 - annotate packing slips/invoices to certify receipt of all materials retained
 - deliver packing slips/invoices to invoice processor
 - insert and/or update processing slips for materials to be retained
 - mark materials retained for the collection as required (invoice number, date of receipt, etc.)
 - place materials to be cataloged on the appropriate book trucks
 - forward any serials/numbered series received to the serials control section

ACTIVITIES

ACQUISITIONS

ENTRY LEVEL

Receipt Processing (cont'd)

15. Supervise receipt processing of ordered/requested materials, blanket order/on-approval shipments, unsolicited gifts, etc. (cont'd)

process office copies as required and send to the appropriate staff members
send form letters to acknowledge gifts, if appropriate
prepare damaged/imperfect materials, incorrectly supplied materials, and unwanted materials for return to suppliers, if appropriate
place unwanted/damaged items not to be returned to suppliers in specified area to await proper disposal
maintain statistical record of receipt processing operations

16. Supervise the delivery of library materials to the cataloging section at regular intervals

17. Supervise preparation and disposal of unwanted library materials

File Maintenance

18. Supervise creation and maintenance of in-process file(s)

input orders/requests, want list items, unsolicited receipts
update records based on correspondence received and actions taken
update records with receipt, return and disposal information
update records with cataloger assignment, if appropriate
update records when cataloging has been completed and items are no longer in process
delete records at appropriate intervals, maintain statistical records of file creation and maintenance operations

19. Supervise maintenance of accession records for materials which will not be added to the library's collections, if required

Other

20. Handle problems related to the selection and acquisition of library materials; refer special problems to higher level staff, as appropriate
21. Assist staff in locating materials received in the library but still in process
22. Advise other libraries of sources used to obtain difficult-to-locate materials

ACTIVITIES

ACQUISITIONS

ENTRY LEVEL

Other (cont'd)

23. Supervise the preparation of exchange lists for items selected by senior librarians
24. Examine dealers' stocks and publishers'/producers' displays at book/AV fairs and conferences in order to become familiar with the characteristics of the various offerings
25. Conduct library business by phone, when appropriate
26. Write memos and letters, as required
27. Prepare manuals of procedures
28. Make recommendations to the section manager for improvement in operations of the unit/section
29. Attend and participate in staff meetings
30. Provide an overview of the operations of the unit/section to visitors, as requested
31. Supervise technicians and other paraprofessional staff
32. Work to develop "esprit de corps" among staff supervised
33. Assist section manager in writing job descriptions for self and for staff supervised
34. Assist section manager in developing performance standards for self and for staff supervised
35. Assist section manager in the review and performance evaluation of staff supervised
36. Assist in the selection of new technicians and paraprofessionals
37. Keep abreast of developments in the information field, library practice or legislation that affect selection and acquisition of library materials
38. Attend professional meetings and prepare reports for dissemination to staff
39. Develop professional contacts both within and outside the library

ACTIVITIES

ACQUISITIONS

MID LEVEL

Selection

40. Keep abreast of the information needs of the parent organization so that selection of library materials may be made to support new areas of interest/activity
41. Select materials which are to be placed on the want list based on recommendations of entry level staff

Verification and Ordering

42. Supervise the maintenance of an address file of procurement sources
43. Draft form letters for ordering/requesting library materials, claiming/canceling orders, acknowledging gifts, etc.
44. Schedule purchases of library materials in order to operate within the budget
45. Work with contract and/or purchasing department(s) of the parent organization to identify requirements and develop draft procedures for purchasing library materials
46. Work with serials control staff to develop draft procedures for ordering and fiscal control of serials/numbered series

Fiscal Control

47. Work with the finance and accounting department of the parent organization to identify requirements and develop draft procedures for processing invoices for payment
48. Supervise invoice processing for acquisition of library materials

receive and log in packaging slips/invoices from acquisitions and
serials control staff with receipt information noted
receive and log in original invoices
match original invoices with annotated packaging slips/invoice
copies
convert currency to U.S. dollars, if required
search/request search of acquisition and serials control files to
verify receipt, if necessary
maintain record of expenditures by account, including office copy
charges to individual departments
process approved invoices for payment and forward them to the
appropriate fiscal office
process purchase order documents as required
receive correspondence from suppliers

ACTIVITIES

ACQUISITIONS

MID LEVEL

Fiscal Control (cont'd)

48. Supervise invoice processing for acquisition of library materials (cont'd)

draft replies to correspondence concerning payment problems
prepare prepayment statements if required
maintain files of invoices and other documents related to the purchase of library materials
prepare reports of expenditures and balances in all accounts
maintain a record of invoice processing statistics

49. Maintain control of the library materials budget; notify the section manager of situations which may require special action
50. Review reports of expenditures and balances in all accounts as prepared by an accounting technician; draft narrative statements to accompany the reports, if required
51. Approve/modify draft replies to correspondence concerning payment problems
52. Work with the finance and accounting department to establish deposit accounts with certain suppliers
53. Determine the average cost of each type of library material purchased
54. Project budget requirements for purchasing library materials for the new fiscal year
55. Assess performance of existing equipment/systems used in acquisitions and investigate capabilities of other equipment/systems
56. Recommend acquisition of new/additional equipment/systems
57. Train staff in operation and in-house maintenance of equipment/systems
58. Supervise in-house operation and maintenance of equipment/systems
59. Gather information for maintenance contracts on equipment/systems
60. Draft statements of work for contact proposals for services, systems, equipment and/or maintenance
61. Evaluate contractors' proposals
62. Train and supervise entry level staff and accounting technician(s)

ACTIVITIES

ACQUISITIONS

MID LEVEL

Fiscal Control (cont'd)

- 63. Assist in the selection of new professional staff and accounting technician(s)
 - 64. Write articles for professional journals/newsletters when appropriate
-

ACQUISITIONS

SENIOR LEVEL

Selection

- 65. Select and maintain an up-to-date collection of selection tools and aids to bibliographic verification
- 66. Together with reference and interlibrary loan section staff members, analyze library resources in the area and make recommendations concerning the degree to which duplication of collections should occur. Identify subject areas in which resource sharing may be mutually beneficial
- 67. Formulate draft selection and retention policies for all types of library materials
- 68. Prepare draft selection guidelines to be used by section staff as an aid to interpreting selection policies
- 69. Periodically review staff selections to ensure more uniform interpretation of the selection policies; conduct training sessions as required
- 70. Evaluate the existing collection(s) and identify areas of weakness
- 71. Prepare lists of materials to be purchased in order to upgrade areas of weakness in the collection(s)
- 72. Together with reference staff, compile lists of reference books and standard works that comprise a basic collection in each major subject area. New editions of these materials are purchased automatically
- 73. Together with reference staff, select materials for a small collection to support organizational staff who may be located in a remote facility

ACTIVITIES

ACQUISITIONS

SENIOR LEVEL

Selection (cont'd)

74. Develop guidelines for identifying materials in the collection(s) which should be retained in microform for preservation
75. Select materials to be weeded from the collection; coordinate procedures for this periodic activity with circulation, collection maintenance, and catalog file maintenance staff members
76. Select items to be replaced which have been reported as missing following an inventory of the collection
77. Review damaged materials identified by collection maintenance staff; determine which materials should be replaced, discarded, rebound, or replaced by a new edition or more recent work on the same subject
78. Select items which have been weeded or set aside for disposal which may be offered to exchange partners
79. Identify existing collections of special value to the library which are advertised for sale or which may be solicited as gifts

Other

80. Function as a technical expert in all matters of selection and acquisition of library materials
81. Work with senior cataloging and serials control staff members to identify processing priorities and draft guidelines for priority assignment to all incoming library materials
82. Interview salesmen and publishers' and dealers' representatives to learn about forthcoming publications, revisions of standard reference works, services offered, etc.
83. Assist the section manager in negotiating with publishers' and dealers' representatives to set up on approval programs and other services
84. Prepare an evaluation of each dealer's performance for review by the section manager
85. Identify sources for obtaining out of print materials which are to be replaced/added to the collection
86. Draft a gift acceptance policy statement

ACTIVITIES

ACQUISITIONS

SENIOR LEVEL

Other (cont'd)

87. Identify potential exchange partners
88. Draft an exchange policy statement
89. Draft documentation to establish an exchange program
90. Supervise the exchange program
91. Appraise the value of highly specialized and rare materials
92. Identify sources for disposal of unwanted materials
93. Draft documentation to set up disposal program, including special provisions for disposal of classified materials
94. Draft all selection and acquisition procedures and policies; draft revisions as required
95. Flowchart and document selection and acquisition procedures
96. Assist section manager in on-going systems analysis of the section
97. Analyze statistics for all operations in the section and prepare draft statistical reports
98. Train and supervise mid level staff
99. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

ACQUISITIONS

ENTRY LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- *** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- *** knowledge of definition, structure, and formats of information
- * knowledge of alternative approaches to the organization of information
- * knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- * knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- * knowledge of career opportunities
- ** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- * knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- * knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
- *** knowledge of the activities that are required to offer the services and produce the products
- ** knowledge of the various resources that are necessary to support the activities
- *** knowledge of acquisition tools and sources of bibliographic information
- ** knowledge of acquisition methods and techniques
- *** knowledge of performance expected and how it can be measured
- *** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

ACQUISITIONS

ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities
- *** knowledge of how to use the acquisitions tools and sources of bibliographic information
- *** knowledge of how to apply the acquisitions methods and techniques
 - * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- *** knowledge of the mission, goals and objectives of the organization served
- *** knowledge of the structure of the organization and the role of the library (or information center) within the organization
 - * knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
 - ** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
 - ** knowledge of the users' information needs and requirements
 - ** knowledge of the collection, and of related collections

ACQUISITIONS

MID LEVEL

- *** greater depths of knowledge specified above
 - ** knowledge of the operations of other sections in the library and how they relate to acquisitions
- *** knowledge of available vendor-supplied systems, services and products to support acquisitions
- *** knowledge of the contracting process, both in general and within the organization
 - * knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

ACQUISITIONS

SENIOR LEVEL

- *** greater depths of knowledge specified above**
 - * knowledge of public relations techniques**
 - * knowledge of statistical description, analysis, interpretation and presentation**
- *** knowledge of the costs associated with library resources (materials, personnel, space, etc.)**
 - ** knowledge of cost analysis and interpretation methods**
- *** knowledge of methods of resource allocation**
 - ** knowledge of standards, measures and methods for evaluating personnel**
 - * knowledge of alternative management structures and their implications for the operation of the library**
- * state-of-the-art knowledge of library research and practice**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

KNOWLEDGE

ACQUISITIONS

ENTRY LEVEL

Basic knowledge

- * knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- ** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- * knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- ** knowledge of alternative approaches to the organization of information
- ** knowledge of alternative approaches to retrieval of information
- *** knowledge of alternative approaches to information management
- ** knowledge of available and emerging information technologies and their applications
- ** knowledge of completed and ongoing research in the field and its applicability to practice
- * knowledge of career opportunities
- ** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- ** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- ** knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- * knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
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KNOWLEDGE

ACQUISITIONS

ENTRY LEVEL

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- * knowledge of the policies and procedures relevant to the library (or information center)
- * knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- * knowledge of the users' information needs and requirements
- * knowledge of the collection, and of related collections

ACQUISITIONS

MID LEVEL

- ** knowledge of the operations of other sections in the library and how they relate to acquisitions
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KNOWLEDGE

ACQUISITIONS

SENIOR LEVEL

- * knowledge of public relations techniques
- * knowledge of statistical description, analysis, interpretation and presentation
- * knowledge of the costs associated with library resources (materials, personnel, space, etc.)
- * knowledge of cost analysis and interpretation methods
- * knowledge of methods of resource allocation
- * knowledge of standards, measures and methods for evaluating personnel
- * knowledge of alternative management structures and their implications for the operation of the library
- ** state-of-the-art knowledge of library research and practice

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

ACQUISITIONS

ENTRY LEVEL

Basic Skills

***** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity
- * establish rapport with users and colleagues
- * communicate well by written, verbal and non-verbal means
- conduct an interview
- * conduct meetings with individuals and groups
- * collect, analyze and interpret data
- * make decisions and recommendations based on available information
- supervise staff
- * work independently and in groups
- develop criteria for evaluation

Ability to:

- * make effective, timely, and well-informed decisions
- isolate and define problems and develop the necessary criteria and action for their solution
- ** manage time effectively

ACQUISITIONS

MID LEVEL

Skills Related to Each Specific Activity

**** Skills listed above are developed to a greater extent**

Ability to:

- ** perceive the needs of the organization and not just the library
- * anticipate long-range needs of library
- ** design systems and procedures to improve library operations
- * arbitrate and negotiate

SKILLS

ACQUISITIONS

SENIOR LEVEL

***** Skills listed above are developed to a greater extent**

Ability to:

***** apply methods of measurement and evaluation**

***** budget and make projections**

***** optimize the use of library resources**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

SKILLS

ACQUISITIONS

ENTRY LEVEL

Basic Skills

- * literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

- * communicate well by written, verbal and non-verbal means
- ** conduct an interview
- * conduct meetings with individuals and groups
- * make decisions and recommendations based on available information
- * supervise staff
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Ability to:

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**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

ATTITUDES

ACQUISITIONS

Dispositional Attitudes

Attitudes Toward Institutions

- *** Respect for profession**
- *** Respect for the library**
- ** Respect for the parent organization**

Attitudes Toward Other People

Toward Users

- *** Respect users**
 - * Like people in general**
- ** Like to help people**
 - Like to meet people**
 - Like to make others feel comfortable**
- * Sensitive to others' needs**

Toward Others in the Workplace

- ** Respect co-workers**
 - * Like to work with others/as a team**
 - Like to work on own**
 - * Willingness to draw upon and share knowledge and experience with others**
- * Supportive of co-workers**
- * Enjoy managing/supervising others**

Personal Qualities

- ** Alertness**
 - * Assertiveness**
 - * Compassion/Kindness**
 - * Confidence**
 - * Cheerfulness**
- *** Dependability**
 - Determination/Tenacity**
 - * Diplomacy**
 - * Emotional stability**
 - * Fairness**
 - * Flexibility/Versatility**
 - * Imagination**
 - * Inquisitiveness**

ATTITUDES

ACQUISITIONS

Personal Qualities (cont'd)

- * Leadership ability
- * Neatness
- * Need for achievement
- * Objectivity
- * Open-mindedness
- * Optimism/Positive attitude
- ** Organization
- Patience
- Physical endurance
- ** Resourceful
- ** Sensitive/Thoughtful
- * Sense of humor
- *** Sense of ethics
- * Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- *** Willingness to take/accept responsibility
- * Willingness to take initiative
- ** Willingness to respond to authority, apply and follow policy
- ** Desire to learn/try
- * Willingness to fail
- *** Willingness to ask questions
- ** Desire to work to best of ability
- ** Responsiveness to time constraints
- *** Accuracy
- * Willingness to get hands dirty
- ** Attention to detail
- * Willingness to do clerical tasks
- *** Desire to follow-through
- * Service orientation
- * Organizational identity
- * Willingness to promote library and its services
- ** View of library as part of a larger information environment
- ** View of library as an organization
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense
- * Curiosity
- * Variety of interests
- * Desire to grow personally
- * Desire to grow professionally
- * Desire to remain current in specific and general subject field
- ** Positive attitude toward job

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SPECIAL LIBRARIAN COMPETENCIES
CATALOGING

ACTIVITIES

CATALOGING

ENTRY LEVEL

1. Supervise and perform, as required, pre-cataloging searching
2. Perform descriptive cataloging (with or without copy) for materials which will require original cataloging
3. Determine main and added entries
4. Assign subject headings from the approved list(s) of headings
5. Classify materials using the approved classification system(s)
6. Establish cataloging authority data
7. Establish cross reference data
8. Code cataloging and authority data for data entry as part of the cataloging process, or prepare the main entry catalog card
9. Recatalog and reclassify materials already in the collection, as required
10. Consult reference books and/or online files, and/or make phone calls to obtain information necessary for cataloging
11. Refer cataloging problems to higher level staff
12. Keep abreast of changes relating to cataloging procedures (e.g., in-house memos, LC rule interpretations of AACR 2, new subject terms, updated instructions for searching/updating online files, etc.)
13. Maintain a record of pre-cataloging searching statistics
14. Maintain a record of cataloging statistics

Other

15. Write memos and letters as required
16. Prepare manuals of procedures for pre-cataloging searching
17. Select/develop a processing form to be use in pre-cataloging searching
18. Make recommendations to the section manager for improvement in operations of the unit/section and for improvement in bibliographic access to the collection(s)
19. Attend and participate in staff meetings

ACTIVITIES

CATALOGING

ENTRY LEVEL

Other (con't'd)

20. Provide an overview of the operations of the unit/section to visitors, as requested
21. Train and supervise pre-cataloging searchers
22. Work to develop "esprit de corps" among staff supervised
23. Assist section manager in writing job descriptions for self and staff supervised
24. Assist section manager in developing performance standards for self and for staff supervised
25. Assist section manager in the review and performance evaluation of staff supervised
26. Assist in the selection of new technicians
27. Keep abreast of developments in the information field or library practice that affect cataloging, classification, and bibliographic files and networks
28. Attend professional meetings and prepare reports for dissemination to staff
29. Develop professional contacts both within and outside the library

CATALOGING

MID LEVEL

30. Perform cataloging and classification of difficult materials
31. Supervise limited cataloging of certain types of library materials and titles for which network supplied cataloging will be accepted
32. Supervise Outtering, as required
33. Handle cataloging problems encountered by entry level staff; refer to higher level staff, if necessary

ACTIVITIES

CATALOGING

MID LEVEL

- 34. Maintain a statistical record of cataloging difficult items
- 35. Maintain a record of limited cataloging statistics
- 36. Maintain a record of Cutting statistics

Bibliographic Files

- 37. Supervise maintenance of accession records, if appropriate
- 38. Supervise online entry of cataloging data and/or locator data, if appropriate
- 39. Supervise proofreading of computer printouts of cataloging data, if appropriate
- 40. Supervise ordering/preparation of card sets, if a card catalog is maintained
- 41. Supervise and revise filing of cards, if required
- 42. Supervise physical maintenance of the card catalog, if required
 - replace catalog cards, guide cards, and drawer labels
 - shift cards
- 43. Supervise updating the bibliographic files (online or manual)
 - add/correct locator data
 - indicate number of copies owned
 - indicate holdings data for multi-volume sets
 - indicate withdrawal or loss of materials
 - delete/correct incorrect records
- 44. Supervise production of lists of new accessions; forward them to the circulation section for distribution
- 45. Maintain statistical records of operations relating to the creation and maintenance of bibliographic files

ACTIVITIES

CATALOGING

MID LEVEL

Materials Processing

46. Supervise the physical processing of all items to be added to the library's collection(s):

- mark materials with the library's identification
- affix security labels
- type and apply classification labels
- prepare item cards for circulation, or affix circulation bar code/OCR labels
- affix date due slips, if required
- open new books
- apply purchased covers
- mount pamphlet-type materials in special binders
- place AV materials in proper storage containers, if required
- segregate materials requiring special treatment or repairs and deliver to collection maintenance section
- place new materials on appropriate book trucks and deliver to designated locations in library

47. Maintain statistical records of operations relating to the physical processing of materials

Other

48. Prepare manuals of procedures for limited cataloging, Cutting, creation and maintenance of bibliographic files, and for physical processing of library materials
49. Select/develop processing forms/input forms to be used in all activities supervised
50. Work closely with collection maintenance staff and selection staff during inventories and/or weeding so bibliographic files may be updated as required
51. Assess performance of existing equipment/systems used in cataloging and investigate capabilities of other equipment/systems
52. Recommend acquisition of new/additional equipment/systems
53. Train staff in operation and in-house maintenance of equipment/systems
54. Supervise in-house operation and maintenance of equipment/systems
55. Gather information for maintenance contracts on equipment/systems

ACTIVITIES

CATALOGING

MID LEVEL

Other (cont'd)

- 56. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
- 57. Evaluate contractors' proposals
- 58. Assess quality of supplies used in physical processing of library materials
- 59. Work with circulation and collection maintenance staff members to recommend changes in supplies/methods for physical processing of library materials when current processing is inadequate
- 60. Train and supervise entry level catalogers
- 61. Train and supervise technicians and paraprofessionals
- 62. Assist in the selection of new professional staff
- 63. Write articles for professional journals/newsletters when appropriate

CATALOGING

SENIOR LEVEL

Cataloging

- 64. Function as a technical expert in the cataloging section
- 65. Determine level of cataloging (full or limited) for all materials received for cataloging
- 66. Assign materials to each cataloger
- 67. Supervise recordkeeping indicating location in section of each item to be cataloged
- 68. Revise all cataloging performed in section and/or under contract to ensure consistency of interpretation of library's cataloging policies and standards
- 69. Maintain a statistical record for each cataloger indicating quantity and quality of cataloging produced
- 70. Maintain a summary record of revision statistics

ACTIVITIES

CATALOGING

SENIOR LEVEL

Other

71. Maintain an up-to-date collection of reference works necessary to support cataloging and creation of authority records
72. Prepare cataloging manuals and other aids to improve the quality of cataloging produced by the section or by contractors
73. Select/develop cataloging input forms
74. Draft cataloging procedures and policies; draft revisions as required
75. Draft guidelines for determining level of cataloging to be given to various categories of library materials
76. Keep abreast of developments in network, national, and international standards for bibliographic description
77. Together with the section manager, represent the library at bibliographic network/consortia meetings
78. Keep abreast of the information needs of the parent organization so that proper assignment of subject headings and classification numbers may provide users with ready access to topics of special importance
79. Recommend expansion of the library's classification system(s) as required
80. Recommend expansion of the library's standard list of subject headings, as required
81. Work with serials control and interlibrary loan staff members to produce and/or update the library's serials holdings list
82. Make inquiries and recommendations concerning the advertisement, publication, and distribution of book/microform catalogs, lists of new titles cataloged, etc.
83. Recommend participation in bibliographic network(s)/projects
84. Supervise the procedures and quality of data for input to union catalogs and bibliographic networks/projects
85. Flowchart and document all cataloging section procedures
86. Assist section manager in on-going systems analysis of the section

ACTIVITIES

CATALOGING

SENIOR LEVEL

Other (cont'd)

- 87. Analyze cataloging section statistics and prepare draft statistical reports
- 88. Train and supervise mid level staff
- 89. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

CATALOGING

ENTRY LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- ** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- *** knowledge of definition, structure, and formats of information
- ** knowledge of alternative approaches to the organization of information
- ** knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- * knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- knowledge of career opportunities
- *** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- ** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- ** knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- * knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the cataloging function, the range of services and products offered (both actual and potential)
- ** knowledge of the activities that are required to offer the services and produce the products
- ** knowledge of the various resources that are necessary to support the activities
- *** knowledge of cataloging tools and sources of bibliographic information
- *** knowledge of cataloging methods and techniques
- ** knowledge of performance expected and how it can be measured
- ** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

CATALOGING

ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities
- *** knowledge of how to use the cataloging tools and sources of bibliographic information
- *** knowledge of how to apply the cataloging methods and techniques
- ** knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- * knowledge of the mission, goals and objectives of the organization served
- * knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
- ** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- *** knowledge of the users' information needs and requirements
- ** knowledge of the collection, and of related collections

CATALOGING

MID LEVEL

- *** greater depths of knowledge specified above
- ** knowledge of the operations of other sections in the library and how they relate to cataloging
- ** knowledge of available vendor-supplied systems, services and products to support cataloging
- * knowledge of the contracting process, both in general and within the organization
- * knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

CATALOGING

SENIOR LEVEL

- *** greater depths of knowledge specified above
 - * knowledge of public relations techniques
 - * knowledge of statistical description, analysis, interpretation and presentation
 - * knowledge of the costs associated with library resources (materials, personnel, space, etc.)
 - * knowledge of cost analysis and interpretation methods
- *** knowledge of methods of resource allocation
- ** knowledge of standards, measures and methods for evaluating personnel
- ** knowledge of alternative management structures and their implications for the operation of the library
- *** state-of-the-art knowledge of library research and practice

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
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KNOWLEDGE

CATALOGING

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SKILLS

CATALOGING

ENTRY LEVEL

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Skills Related to Specific Activities

Ability to:

- * perform each activity**
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ATTITUDES

CATALOGING

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ATTITUDES

CATALOGING

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SPECIAL LIBRARIAN COMPETENCIES
CIRCULATION AND USER SERVICES

ACTIVITIES

CIRCULATION AND USER SERVICES

ENTRY LEVEL

1. Supervise daily operation of the circulation desk:

- receive requests for materials
- fulfill requests for materials
- issue, renew, receive materials
- examine returned materials for damage, proper markings, etc.
- discharge materials
- maintain circulation files for regular and long-term loan periods
- reserve books for individual users
- follow-up overdues
- collect overdue fines, if appropriate
- collect funds for lost materials or charge losses to the
respective organizational departments
- maintain record of funds collected and charges assessed
- register users
- maintain registration file
- provide users with information on circulation policies and
procedures
- place returned materials on appropriate book trucks
- forward damaged materials to the collection maintenance section
- maintain record of circulation and user statistics
- maintain temporary files of requests for materials owned but not
found in the collection
- maintain temporary files of requests for materials not owned by
the library

2. Attempt to locate requested materials that technicians report as "not found on shelf"
3. Refer user to interlibrary loan section to obtain materials that are needed before purchased copies could be received
4. Perform circulation procedures when necessary
5. Supervise and schedule shelving/storage of circulated materials in the collections
6. Assist users in locating materials in the catalog and in the collection(s)
7. Monitor use of rare, valuable, or classified materials
8. Assist users in the operation of A-V and other equipment
9. Supervise the distribution of new accessions lists to organizational staff

ACTIVITIES

CIRCULATION AND USER SERVICES

ENTRY LEVEL

10. Set up and maintain display of new books in the reading room
11. Supervise shelving of the current journal issues in the reading room
12. Supervise orderly maintenance of the reading room (clearing tables, re-shelving newspapers, etc.)
13. Handle user complaints; refer to higher level staff if appropriate
14. Check circulation files for materials issued to departing staff; notify manager of circulation section of users' status
15. Keep informed of current copyright legislation and its impact on libraries and users
16. Conduct library business by phone, when appropriate
17. Write memos and letters, as required
18. Prepare manuals of procedures
19. Make recommendations to the section manager for improvement in operations of the unit/section and for improvement in services to users
20. Attend and participate in staff meetings
21. Provide an overview of the operations of the unit/section to visitors, as requested
22. Train and supervise technicians and other paraprofessional staff
23. Work to develop "esprit de corps" among staff supervised
24. Assist section manager in writing job descriptions for self and for staff supervised
25. Assist section manager in developing performance standards for self and for staff supervised
26. Assist section manager in the review and performance evaluation of staff supervised
27. Keep abreast of developments in the information field, library practice, or legislation that affects circulation and use of library materials

ACTIVITIES

CIRCULATION AND USER SERVICES

ENTRY LEVEL

- 28. Attend professional meetings and prepare reports for dissemination to staff
 - 29. Develop professional contacts both within and outside the library
-

CIRCULATION AND USER SERVICES

MID LEVEL

- 30. Forward requests for "not found" and "not owned" materials to the acquisitions section
- 31. Notify acquisitions section of library materials which have been lost by users
- 32. Ensure proper posting of copyright legislation notice on all copying machines
- 33. Conduct library orientation sessions for new organizational staff
- 34. Devise tools and displays which will ease access to collections and motivate use
- 35. Make preliminary selection of forms and/or develop draft record formats for all circulation files and operations
- 36. Work with interlibrary loan section staff and collection maintenance staff to develop procedures and resolve problems related to use of the circulation files/system for interlibrary loan purposes, for control of materials sent to the bindery, and for use in identifying materials for possible weeding
- 37. Work with the collection maintenance staff to develop procedures and resolve problems related to the daily operation and maintenance of the library's security system by circulation staff
- 38. Work with collection maintenance and cataloging staff members to recommend changes in supplies/methods for physical processing of library materials when current processing is inadequate
- 39. Assess performance of existing equipment/systems used in circulation and investigate capabilities of other equipment/systems
- 40. Recommend acquisition of new/additional equipment/systems
- 41. Train staff in operation and in-house maintenance of equipment/systems

ACTIVITIES

CIRCULATION AND USER SERVICES

MID LEVEL

- 42. Supervise in-house operation and maintenance of equipment/systems (including AV hardware)
- 43. Gather information for maintenance contracts on equipment/systems
- 44. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
- 45. Evaluate contractors' proposals
- 46. Train and supervise entry level staff
- 47. Assist in the selection of new professional staff
- 48. Write articles for professional journals/newsletters when appropriate

CIRCULATION AND USER SERVICES

SENIOR LEVEL

- 49. Function as a technical expert in the circulation section
- 50. Draft procedures to expedite return of circulated materials to the collection(s)
- 51. Make inquiries and recommendations concerning the advertisement, publication, and distribution of print and non-print materials prepared by section staff
- 52. Draft circulation procedures and policies; draft revisions as required
- 53. Flowchart and document circulation procedures
- 54. Assist section manager in on-going systems analysis of the section
- 55. Analyze circulation statistics and prepare draft statistical reports
- 56. Analyze financial data and prepare draft financial reports
- 57. Supervise mid level staff
- 58. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

CIRCULATION AND USER SERVICES

ENTRY LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- * knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- * knowledge of definition, structure, and formats of information
- * knowledge of alternative approaches to the organization of information
- ** knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- * knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- * knowledge of career opportunities
- ** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the circulation function, the range of services and products offered (both actual and potential)
- *** knowledge of the activities that are required to offer the services and produce the products
- ** knowledge of the various resources that are necessary to support the activities
- *** knowledge of circulation systems
- *** knowledge of circulation methods and techniques
- * knowledge of marketing techniques and public relations
- * knowledge of performance expected and how it can be measured
- ** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

CIRCULATION AND USER SERVICES

ENTRY LEVEL

Knowledge of how to do work

- ** knowledge of how to perform the various activities
- *** knowledge of how to use the circulation systems
- ** knowledge of how to apply the circulation methods and techniques
- * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- * knowledge of the mission, goals and objectives of the organization served
- ** knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
- *** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- *** knowledge of the users' information needs and requirements
- *** knowledge of the collection, and of related collections

CIRCULATION AND USER SERVICES

MID LEVEL

- *** greater depths of knowledge specified above
- *** knowledge of the operations of other sections in the library and how they relate to circulation and user services
- ** knowledge of available vendor-supplied systems, services and products to support circulation and user services
- * knowledge of the contracting process, both in general and within the organization
- *** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

CIRCULATION AND USER SERVICES

SENIOR LEVEL

- *** greater depths of knowledge specified above
- ** knowledge of statistical description, analysis, interpretation and presentation
- *** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
- *** knowledge of cost analysis and interpretation methods
 - * knowledge of methods of resource allocation
- *** knowledge of standards, measures and methods for evaluating personnel
 - ** knowledge of alternative management structures and their implications for the operation of the library
 - * state-of-the-art knowledge of library research and practice

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

KNOWLEDGE

CIRCULATION AND USER SERVICES

ENTRY LEVEL

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- ** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)**
- * knowledge of foreign languages**

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- * knowledge of alternative approaches to the organization of information**
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- * knowledge of how to learn on an ongoing basis**

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- ** knowledge of the variety of work settings and their organizational structures**
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Knowledge of what work is done

- *** knowledge of the circulation function, the range of services and products offered (both actual and potential)**
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- ** knowledge of the various resources that are necessary to support the activities**
- *** knowledge of circulation systems**
- *** knowledge of circulation methods and techniques**
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- ** knowledge of performance expected and how it can be measured**
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CIRCULATION AND USER SERVICES

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- * knowledge of the policies and procedures relevant to the library (or information center)
- * knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- * knowledge of the users' information needs and requirements
- * knowledge of the collection, and of related collections

CIRCULATION AND USER SERVICES

MID LEVEL

- * greater depths of knowledge specified above
- * knowledge of the operations of other sections in the library and how they relate to circulation and user services
- * knowledge of available vendor-supplied systems, services and products to support circulation and user services
- * knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

CIRCULATION AND USER SERVICES

SENIOR LEVEL

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- * knowledge of statistical description, analysis, interpretation and presentation
- * knowledge of the costs associated with library resources (materials, personnel, space, etc.)
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- * knowledge of methods of resource allocation
- * knowledge of standards, measures and methods for evaluating personnel
- * knowledge of alternative management structures and their implications for the operation of the library
- * state-of-the-art knowledge of library research and practice

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

CIRCULATION AND USER SERVICES

ENTRY LEVEL

Basic Skills

***** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity
- *** establish rapport with users and colleagues
- *** communicate well by written, verbal and non-verbal means
- * conduct an interview
- ** conduct meetings with individuals and groups
- * collect, analyze and interpret data
- * make decisions and recommendations based on available information
- * supervise staff
- * work independently and in groups
- ** develop criteria for evaluation

Ability to:

- * make effective, timely, and well-informed decisions
- * isolate and define problems and develop the necessary criteria and action for their solution
- ** manage time effectively

CIRCULATION AND USER SERVICES

MID LEVEL

Skills Related to Each Specific Activity

***** Skills listed above are developed to a greater extent**

Ability to:

- ** perceive the needs of the organization and not just the library
- * anticipate long-range needs of library
- * design systems and procedures to improve library operations
- * arbitrate and negotiate

SKILLS

CIRCULATION AND USER SERVICES

SENIOR LEVEL

***** Skills listed above are developed to a greater extent**

Ability to:

- *** apply methods of measurement and evaluation**
- *** budget and make projections**
- *** optimize the use of library resources**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

SKILLS

CIRCULATION AND USER SERVICES

ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

- * collect, analyze and interpret data**
- * make decisions and recommendations based on available information**
- * supervise staff**
- * develop criteria for evaluation**

Ability to:

- * manage time effectively**

CIRCULATION AND USER SERVICES

MID LEVEL

Skills Related to Each Specific Activity

Ability to:

- * perceive the needs of the organization and not just the library**
- * anticipate long-range needs of library**
- * design systems and procedures to improve library operations**
- * arbitrate and negotiate**

CIRCULATION AND USER SERVICES

SENIOR LEVEL

Ability to:

- * optimize the use of library resources**

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

ATTITUDES

CIRCULATION AND USER SERVICES

Dispositional Attitudes

Attitudes Toward Institutions

- *** Respect for profession**
- *** Respect for the library**
- ** Respect for the parent organization**

Attitudes Toward Other People

Toward Users

- *** Respect users**
- ** Like people in general**
 - * Like to help people**
 - * Like to meet people**
 - * Like to make others feel comfortable**
- ** Sensitive to others' needs**

Toward Others in the Workplace

- *** Respect co-workers**
- *** Like to work with others/as a team**
 - Like to work on own**
- ** Willingness to draw upon and share knowledge and experience with others**
- ** Supportive of co-workers**
 - * Enjoy managing/supervising others**

Personal Qualities

- *** Alertness**
 - * Assertiveness**
 - * Compassion/Kindness**
- ** Confidence**
 - * Cheerfulness**
- *** Dependability**
 - Determination/Tenacity**
- *** Diplomacy**
 - ** Emotional stability**
 - * Fairness**
- ** Flexibility/Versatility**
 - * Imagination**
 - * Inquisitiveness**

ATTITUDES

CIRCULATION AND USER SERVICES

Personal Qualities (cont'd)

- * Leadership ability
- * Neatness
- * Need for achievement
- ** Objectivity
- * Open-mindedness
- ** Optimism/Positive attitude
- ** Organization
- ** Patience
 - Physical endurance
- ** Resourceful
 - * Sensitive/Thoughtful
- ** Sense of humor
- *** Sense of ethics
- *** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- *** Willingness to take/accept responsibility
 - * Willingness to take initiative
- *** Willingness to respond to authority, apply and follow policy
- *** Desire to learn/try
 - * Willingness to fail
- *** Willingness to ask questions
- *** Desire to work to best of ability
 - ** Responsiveness to time constraints
- *** Accuracy
 - * Willingness to get hands dirty
 - ** Attention to detail
 - * Willingness to do clerical tasks
 - ** Desire to follow-through
- *** Service orientation
 - * Organizational Identity
- *** Willingness to promote library and its services
 - * View of library as part of a larger information environment
 - * View of library as an organization
- *** Ability to see broad picture
 - * Ability to sacrifice short-term gains for long-term goals
 - * Political sense
 - * Curiosity
 - * Variety of interests
 - * Desire to grow personally
 - ** Desire to grow professionally
 - ** Desire to remain current in specific and general subject field
- *** Positive attitude toward job

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

ATTITUDES

CIRCULATION AND USER SERVICES

Dispositional Attitudes

Attitudes Toward Other People

Toward Others in the Workplace

- * Like to work on own
- * Enjoy managing/supervising others

Personal Qualities

- * Assertiveness
- * Flexibility/Versatility
- * Imagination
- * Organization
- * Physical Endurance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- * Service orientation
- * View of library as part of a larger information environment
- * View of library as an organization
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense
- * Curiosity
- * Variety of interests
- * Desire to grow personally

SPECIAL LIBRARIAN COMPETENCIES
COLLECTION MAINTENANCE

ACTIVITIES

COLLECTION MAINTENANCE

ENTRY LEVEL

Storage Maintenance

1. Supervise orderly maintenance of shelves and storage areas
 - place bookends where needed
 - place unbound serial issues in boxes/holders
 - perform minor shifting of sections of the collection, as needed
 - replace shelf labels and location guides as needed
2. Schedule and supervise shelf reading
 - re-shelve materials found in the wrong location
 - identify items in poor condition
3. Supervise data collection to support planning for shifting the collection
 - measure present collection by categories
 - measure shelving/storage equipment capacity
4. Supervise preparation of shelves and other storage equipment prior to shifting the collection
 - adjust height of shelves
 - prepare shelf labels and stack guides

Preservation of Materials

5. Receive materials for repair, cleaning, binding or replacement as identified by circulation staff
6. Receive materials from cataloging which require repair, reinforcement, special containers or binding
7. Supervise in-house treatment of materials
 - repair pages
 - clean pages
 - reinforce bindings
 - laminates book jackets and paperbacks
 - prepare containers for periodicals, AV materials, pamphlets
 - make covers
 - clean and repair AV materials
8. Supervise procedures to obtain photocopies of missing pages and have them bound into the proper items

ACTIVITIES

COLLECTION MAINTENANCE

ENTRY LEVEL

Binding

9. Supervise preparation of materials for binding

prepare binding specifications for monographs selected for binding
arrange serial issues in order and tie binding units together
identify incomplete volumes and notify serial records section of gaps; send for binding when volume is complete
prepare binding specifications for each serial title, if not on file with binder
prepare materials for shipment/pick-up
update binding records with shipment/pick-up date
update circulation records for materials sent to bindery
receive materials from binder
inspect materials for conformity to requirements
check shipment against binder's packing slip/invoice
update binding records with date of return
update circulation records for materials returned from bindery
forward invoice to proper office for payment
maintain file of invoices and other documents related to binding
maintain a statistical record of binding operations

Inventory and Weeding

10. Supervise inventory-taking

assign portions of the shelflist to each technician
identify materials which are missing
identify materials which lack shelflist cards/catalog records
identify materials for which the descriptive cataloging does not match the piece in hand
identify materials which are labeled incorrectly
forward shelflist records for missing items to acquisitions section for possible replacement action
forward materials to cataloging section which require record creation/correction and/or labeling correction

11. Supervise identification of items for possible weeding

flag library materials that have not circulated during a specified time period
notify acquisitions section that selection action is needed
remove materials that have been selected for weeding and forward to cataloging section for file update

12. Maintain a statistical record of inventory-related operations and weeding operations

ACTIVITIES

COLLECTION MAINTENANCE

ENTRY LEVEL

Other

13. Handle problems related to collection maintenance operations; refer problems to higher level staff, as appropriate
14. Conduct library business by phone, when appropriate
15. Write memos and letters, as required
16. Prepare manuals of procedures
17. Make recommendations to the section manager for improvement in operations of the unit/section
18. Attend and participate in staff meetings
19. Provide an overview of the operations of the unit/section to visitors, as requested
20. Supervise technicians and other paraprofessional staff
21. Work to develop "esprit de corps" among staff supervised
22. Assist section manager in writing job descriptions for self and for staff supervised
23. Assist section manager in developing performance standards for self and for staff supervised
24. Assist manager in the review and performance evaluation of staff supervised
25. Assist in the selection of new technicians and paraprofessionals
26. Keep abreast of developments in the information field, and library practice, binding, and storage and preservation of library materials
27. Attend professional meetings and prepare reports for dissemination to staff
28. Develop professional contacts both within and outside the library

ACTIVITIES

COLLECTION MAINTENANCE

MID LEVEL

Storage Maintenance

29. Work with senior staff to develop procedures for shifting the collection(s)
30. Supervise the shifting of the collection(s)

Preservation of Materials

31. Supervise the proper storage and handling of classified materials
32. Supervise the preservation treatment of rare/older materials
33. Identify serials and other materials available on commercially-produced microforms which should be acquired for preservation purposes; request order action by the acquisitions section for selected titles
34. Supervise the microfilming of selected materials for preservation
35. Determine proper treatment of damaged materials
36. Notify acquisitions section of material which needs replacement
37. Gather information on contract repair and preservation treatment of materials
38. Investigate the capabilities of various library security systems and make a recommendation for purchase
39. Train section staff and circulation staff in the operation and maintenance of the library's security system
40. Work with circulation staff to develop procedures and resolve problems related to their daily operation and maintenance of the library's security system
41. Examine library regularly for sources of moisture, fire or unauthorized entry

ACTIVITIES

COLLECTION MAINTENANCE

MID LEVEL

Binding

42. Gather information on various binding agents: reputation, price, types of binding available, and average length of time materials are inaccessible
43. Prepare draft binding specifications
44. Work with serial records staff to develop procedures for creation of binding records as part of the serial record
45. Prepare draft procedures for in-house binding preparation
46. Work with the proper fiscal office and/or contract office to develop procedures for processing binding invoices
47. Work with the circulation section staff to develop procedures for use of the circulation system to control materials sent to the bindery, to identify heavily used materials, and to identify all materials which circulated during a specified time period

Inventory and Weeding

48. Work with acquisitions and cataloging section staff members to develop procedures to coordinate the replacement of missing materials following inventory and the update of cataloging records following inventory or weeding
49. Work with acquisitions and circulation staff members to draft procedures for identifying materials which should be reviewed by selection staff for possible weeding

Other

50. Make preliminary selection of forms and/or develop draft record formats for all collection maintenance files and operations
51. Assess performance of existing equipment/systems/supplies used in collection maintenance and investigate capabilities of other equipment/systems/supplies
52. Recommend acquisition of new/additional equipment/systems/supplies
53. Train staff in operation and in-house maintenance of equipment/systems
54. Supervise in-house operation and maintenance of equipment/systems

ACTIVITIES

COLLECTION MAINTENANCE

MID LEVEL

Other (cont'd)

55. Gather information for maintenance contracts on equipment/systems
 56. Draft statements of work for contact proposals for services, systems, equipment and/or maintenance
 57. Evaluate contractors' proposals
 58. Train and supervise entry level staff
 59. Assist in the selection of new professional staff
 60. Write articles for professional journals/newsletters when appropriate
-

COLLECTION MAINTENANCE

SENIOR LEVEL

Storage Maintenance

61. Work with the circulation section to identify the most heavily used portions of the collection and to select the type and placement of storage equipment and location guides which would enable users to access library materials more easily
62. Work with selection staff to identify areas of anticipated large growth in the collection(s) and to establish the average growth rate for all areas of the collection(s)
63. Draft a shelving plan to provide adequate space for growth of the collection(s)

Preservation

64. Identify optimum physical conditions for storing various types of library materials
65. Recommend improvements which could be made in current conditions to improve preservation of library materials
66. Draft a plan for regular vermin control in the library
67. Draft an emergency plan for dealing with possible water and smoke damage to the collection(s)

ACTIVITIES

COLLECTION MAINTENANCE

SENIOR LEVEL

Preservation (cont'd)

- 68. Draft a policy statement concerning the preservation versus the replacement of library materials
- 69. Draft guidelines for staff to use in selecting materials for cleaning, repair, reinforcement, binding, or replacement
- 70. Work with selection staff to identify materials which should be retained in microform for preservation
- 71. Work with selection staff to identify valuable/rare materials in the collection which require special treatment

Binding

- 72. Evaluate the performance of the binder(s)

Inventory and Weeding

- 73. Draft procedures for conducting the inventory of the collection(s)
- 74. Recommend the frequency at which inventories should be conducted
- 75. Prepare a draft final report on the status of the collection(s) following inventory

Other

- 76. Function as a technical expert in all matters related to collection maintenance operations
- 77. Draft revisions to collection maintenance policies and procedures as required
- 78. Flowchart and document collection maintenance
- 79. Assist section manager in on-going systems analysis of the section
- 80. Analyze collection maintenance statistics and prepare draft statistical reports
- 81. Analyze financial data and prepare draft financial reports on expenditures for collection maintenance
- 82. Train and supervise mid level staff
- 83. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

COLLECTION MAINTENANCE

ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)

** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- * knowledge of definition, structure, and formats of information
- * knowledge of alternative approaches to the organization of information
- * knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- * knowledge of career opportunities
- *** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- * knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- * knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the collection maintenance function, the range of services and products offered (both actual and potential)
- ** knowledge of the activities that are required to offer the services and produce the products
- * knowledge of the various resources that are necessary to support the activities
- ** knowledge of collection maintenance tools and sources of information
- ** knowledge of collection maintenance methods and techniques
- * knowledge of performance expected and how it can be measured
- *** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

COLLECTION MAINTENANCE

ENTRY LEVEL

Knowledge of how to do work

- ** knowledge of how to perform the various activities
- ** knowledge of how to use the collection maintenance tools and sources
- ** knowledge of how to apply the collection maintenance methods and techniques
- * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- ** knowledge of the mission, goals and objectives of the organization served
- ** knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
- ** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- ** knowledge of the users' information needs and requirements
- *** knowledge of the collection, and of related collections

COLLECTION MAINTENANCE

MID LEVEL

- *** greater depths of knowledge specified above
- *** knowledge of the operations of other sections in the library and how they relate to collection maintenance
- ** knowledge of available vendor-supplied systems, services and products to support collection maintenance
- * knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

COLLECTION MAINTENANCE

SENIOR LEVEL

- *** greater depths of knowledge specified above**
 - * knowledge of public relations techniques**
 - * knowledge of statistical description, analysis, interpretation and presentation**
- *** knowledge of the costs associated with library resources (materials, personnel, space, etc.)**
- ** knowledge of cost analysis and interpretation methods**
- ** knowledge of methods of resource allocation**
- ** knowledge of standards, measures and methods for evaluating personnel**
 - * knowledge of alternative management structures and their implications for the operation of the library**
- ** state-of-the-art knowledge of library research and practice**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

KNOWLEDGE

COLLECTION MAINTENANCE

ENTRY LEVEL

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- * knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- * knowledge of definition, structure, and formats of information
- * knowledge of alternative approaches to the organization of information
- * knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- ** knowledge of career opportunities
- * knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- * knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- * knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- * knowledge of the collection maintenance function, the range of services and products offered (both actual and potential)
- * knowledge of the activities that are required to offer the services and produce the products
- * knowledge of the various resources that are necessary to support the activities
- * knowledge of collection maintenance tools and sources of information
- * knowledge of collection maintenance methods and techniques
- * knowledge of performance expected and how it can be measured
- * knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

COLLECTION MAINTENANCE

ENTRY LEVEL

Knowledge of how to do work

- * knowledge of how to perform the various activities
- * knowledge of how to use the collection maintenance tools and sources
- * knowledge of how to apply the collection maintenance methods and techniques
- * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- * knowledge of the mission, goals and objectives of the organization served
- * knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- * knowledge of the policies and procedures relevant to the library (or information center)
- * knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- * knowledge of the users' information needs and requirements
- * knowledge of the collection, and of related collections

COLLECTION MAINTENANCE

MID LEVEL

- * knowledge of evaluation methods and techniques to evaluate systems, services and products

COLLECTION MAINTENANCE

SENIOR LEVEL

- * knowledge of alternative management structures and their implications for the operation of the library

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

COLLECTION MAINTENANCE

ENTRY LEVEL

Basic Skills

***** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity
- * establish rapport with users and colleagues
- * communicate well by written, verbal and non-verbal means
- * conduct an interview
- ** conduct meetings with individuals and groups
- * collect, analyse and interpret data
- ** make decisions and recommendations based on available information
- supervise staff
- * work independently and in groups
- * develop criteria for evaluation

Ability to:

- * make effective, timely, and well-informed decisions
- * isolate and define problems and develop the necessary criteria and action for their solution
- ** manage time effectively

COLLECTION MAINTENANCE

MID LEVEL

Skills Related to Each Specific Activity

***** Skills listed above are developed to a greater extent**

Ability to:

- ** perceive the needs of the organization and not just the library
- ** anticipate long-range needs of library
- ** design systems and procedures to improve library operations
- arbitrate and negotiate

SKILLS

COLLECTION MAINTENANCE

SENIOR LEVEL

***** Skills listed above are developed to a greater extent**

Ability to:

***** apply methods of measurement and evaluation**

***** budget and make projections**

***** optimize the use of library resources**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

SKILLS

COLLECTION MAINTENANCE

ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

- * collect, analyze and interpret data
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**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

ATTITUDES

COLLECTION MAINTENANCE

Dispositional Attitudes

Attitudes Toward Institutions

- ** Respect for profession
- ** Respect for the library
- * Respect for the parent organization

Attitudes Toward Other People

Toward Users

- *** Respect users
- * Like people in general
- * Like to help people
- * Like to meet people
- Like to make others feel comfortable
- * Sensitive to others' needs

Toward Others in the Workplace

- *** Respect co-workers
- ** Like to work with others/as a team
- * Like to work on own
- ** Willingness to draw upon and share knowledge and experience with others
- ** Supportive of co-workers
- * Enjoy managing/supervising others

Personal Qualities

- *** Alertness
- * Assertiveness
- * Compassion/Kindness
- * Confidence
- Cheerfulness
- *** Dependability
- * Determination/Tenacity
- * Diplomacy
- * Emotional stability
- * Fairness
- * Flexibility/Versatility
- ** Imagination
- * Inquisitiveness
- * Leadership ability

ATTITUDES

COLLECTION MAINTENANCE

Personal Qualities (cont'd)

- * Neatness
- * Need for achievement
- * Objectivity
- * Open-mindedness
- * Optimism/Positive attitude
- *** Organization
- * Patience
- * Physical endurance
- ** Resourceful
- * Sensitive/Thoughtful
- * Sense of humor
- * Sense of ethics
- * Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- ** Willingness to take/accept responsibility
- * Willingness to take initiative
- ** Willingness to respond to authority, apply and follow policy
- * Desire to learn/try
- * Willingness to fail
- *** Willingness to ask questions
- *** Desire to work to best of ability
- * Responsiveness to time constraints
- *** Accuracy
- * Willingness to get hands dirty
- ** Attention to detail
- Willingness to do clerical tasks
- ** Desire to follow-through
- * Service orientation
- * Organizational identity
- * Willingness to promote library and its services
- * View of library as part of a larger information environment
- ** View of library as an organization
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense
- * Curiosity
- * Variety of interests
- * Desire to grow personally
- ** Desire to grow professionally
- * Desire to remain current in specific and general subject field
- *** Positive attitude toward job

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

ATTITUDES

COLLECTION MAINTENANCE

Dispositional Attitudes

Attitudes Toward Other People

Toward Others in the Workplace

- * Like to work on own
- * Enjoy managing/supervising others

Personal Qualities

- * Flexibility Versatility
- * Organization

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- * Service orientation
- * Organizational identity
- * View of library as part of a larger information environment
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense

SPECIAL LIBRARIAN COMPETENCIES

INTERLIBRARY LOAN

ACTIVITIES

INTERLIBRARY LOAN

ENTRY LEVEL

Interlibrary Borrowing (ILB)

1. Receive users' requests for obtaining material from other libraries
2. Discuss cost considerations and time constraints with users
3. Record bibliographic and user information
4. Verify bibliographic information
5. Determine best source for obtaining materials
6. Determine alternate source(s) for obtaining materials as required
7. Supervise processing of ILB requests:

complete loan forms, including copyright compliance notice
transmit loan requests (by phone, mail, courier, teletype, or
computer network)
re-issue loan requests as required
receive materials
notify users of receipt of materials
circulate materials to users
update circulation/ILB files for circulated materials
receive materials from users
examine materials for damage, proper markings, etc.
update circulation/ILB files for returned materials
prepare borrowed materials for mailing/delivery
follow-up overdues
collect/charge overdue fines, if appropriate
maintain record of ILB statistics
maintain record of funds collected or charges assessed to
organizational departments
maintain files of materials obtained and not obtained on loan

8. Perform processing of ILB requests when necessary

Interlibrary Lending (ILL)

9. Receive ILL requests
10. Examine ILL forms for copyright compliance

ACTIVITIES

INTERLIBRARY LOAN

ENTRY LEVEL

Interlibrary Lending (ILL) (cont'd)

11. Supervise processing of ILL requests:

- return ILL forms lacking proper copyright compliance notice
- determine location of material in library
- locate material in the collection
- photocopy journal articles and portions of printed materials
- prepare library materials/photocopies for mailing/delivery
- update circulation/ILL files for loaned materials
- examine returned materials for damage, proper markings, etc.
- update circulation/ILL files for returned materials
- shelve returned materials
- follow-up overdues
- collect/charge overdue fines, if appropriate
- collect funds for lost materials or receive replacement materials
- return ILL forms to originator for materials not owned/not available for loan
- maintain record of ILL statistics
- maintain record of funds collected or charges assessed to organizational departments
- maintain temporary files for ILL requests for materials owned but not found in the collection
- maintain temporary file of ILL requests for materials not owned by the library

12. Check to locate ILL requests that technicians report as "not found on shelf"

13. Perform processing of ILL requests when necessary

Other

14. Handle problems related to borrowing or lending of library materials; refer problems to higher level staff, as appropriate

15. Keep informed of current copyright legislation and its impact on interlibrary loan

16. Conduct library business by phone, when appropriate

17. Write memos and letters, as required

18. Prepare manuals of procedures

ACTIVITIES

INTERLIBRARY LOAN

ENTRY LEVEL

Other (cont'd)

19. Make recommendations to the section manager for improvement in operations of the unit/section and for improvement in services to users
20. Attend and participate in staff meetings
21. Provide an overview of the operations of the unit/section to visitors, as requested
22. Supervise technicians and other paraprofessional staff
23. Work to develop "esprit de corps" among staff supervised
24. Assist section manager in writing job descriptions for self and for staff supervised
25. Assist section manager in developing performance standards for self and for staff supervised
25. Assist manager in the review and performance evaluation of staff supervised
27. Assist in the selection of new technicians and paraprofessionals
28. Keep abreast of developments in the information field, library practice, or legislation that affect interlibrary borrowing and lending
29. Attend professional meetings and prepare reports for dissemination to staff
30. Develop professional contacts both within and outside the library

INTERLIBRARY LOAN

MID LEVEL

31. Forward ILL "not found" and "not owned" requests and ILB requests to acquisitions section
32. Make preliminary selection of forms and/or develop draft record formats for all interlibrary loan files and operations
33. Work with circulation section staff to develop procedures and resolve problems related to use of the circulation files/system for interlibrary loan purposes

ACTIVITIES

INTERLIBRARY LOAN

MID LEVEL

34. Assess performance of existing equipment/systems used in interlibrary loan and investigate capabilities of other equipment/systems
35. Recommend acquisition of new/additional equipment/systems
36. Train staff in operation and in-house maintenance of equipment/systems
37. Supervise in-house operation and maintenance of equipment/systems
38. Gather information for maintenance contracts on equipment/systems
39. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
40. Evaluate contractors' proposals
41. Train and supervise entry level staff
42. Assist in the selection of new professional staff
43. Write articles for professional journals/newsletters when appropriate

INTERLIBRARY LOAN

SENIOR LEVEL

44. Function as a technical expert in the interlibrary loan section
45. Work with serials control and cataloging staff to develop a serials holdings list
46. Make inquiries and recommendations concerning the advertisement, publication, and distribution of the serials holdings list
47. Work with reference and acquisitions staff to analyze library resources in the area and make recommendations concerning the degree to which duplication of collections should occur. Identify subject areas in which resource sharing may be mutually beneficial
48. Identify library networks/consortia which the library should consider joining/forming
49. Draft ILL/ILB procedures and policies; draft revisions as required

ACTIVITIES

INTERLIBRARY LOAN

SENIOR LEVEL

50. Flowchart and document ILL/ILB procedures
51. Assist section manager in on-going systems analysis of the section
52. Analyze ILL/ILB statistics and prepare draft statistical reports
53. Analyze financial data and prepare draft financial reports
54. Supervise mid level staff
55. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

INTERLIBRARY LOAN

ENTRY LEVEL

Basic knowledge

***** knowledge related to literacy, numeracy, communications, etc.**

Subject knowledge

knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)

*** knowledge of foreign languages**

Library & Information Science Knowledge (Generic)

- * knowledge of definition, structure, and formats of information**
- * knowledge of alternative approaches to the organization of information**
- * knowledge of alternative approaches to retrieval of information**
- * knowledge of alternative approaches to information management**
- * knowledge of available and emerging information technologies and their applications**

knowledge of completed and ongoing research in the field and its applicability to practice

knowledge of career opportunities

**** knowledge of how to learn on an ongoing basis**

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)**
- knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered**
- ** knowledge of the users of the services and products, their characteristics and information habits**

Knowledge of what work is done

- *** knowledge of the interlibrary loan function, the range of services and products offered (both actual and potential)**
- *** knowledge of the activities that are required to offer the services and produce the products**
- ** knowledge of the various resources that are necessary to support the activities**
- *** knowledge of interlibrary loan tools and sources of information**
- *** knowledge of interlibrary loan methods and techniques**
- ** knowledge of performance expected and how it can be measured**
- ** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)**

KNOWLEDGE

INTERLIBRARY LOAN

ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities**
- *** knowledge of how to use the interlibrary loan tools and sources**
- ** knowledge of how to apply the interlibrary loan methods and techniques**
- * knowledge of personnel procedures**

Knowledge of the organization served and its library (or information center)

- * knowledge of the mission, goals and objectives of the organization served**
- * knowledge of the structure of the organization and the role of the library (or information center) within the organization**
- knowledge of the various projects and key personnel within the organization**
- ** knowledge of the policies and procedures relevant to the library (or information center)**
- ** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)**
- ** knowledge of the users' information needs and requirements**
- *** knowledge of the collection, and of related collections**

INTERLIBRARY LOAN

MID LEVEL

- *** greater depths of knowledge specified above**
- ** knowledge of the operations of other sections in the library and how they relate to interlibrary loan**
- ** knowledge of available vendor-supplied systems, services and products to support interlibrary loan**
- ** knowledge of the contracting process, both in general and within the organization**
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products**

KNOWLEDGE

INTERLIBRARY LOAN

SENIOR LEVEL

- *** greater depths of knowledge specified above**
 - * knowledge of public relations techniques**
 - * knowledge of statistical description, analysis, interpretation and presentation**
- ** knowledge of the costs associated with library resources (materials, personnel, space, etc.)**
- ** knowledge of cost analysis and interpretation methods**
 - * knowledge of methods of resource allocation**
- ** knowledge of standards, measures and methods for evaluating personnel**
 - * knowledge of alternative management structures and their implications for the operation of the library**
- * state-of-the-art knowledge of library research and practice**

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

KNOWLEDGE

INTERLIBRARY LOAN

ENTRY LEVEL

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
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- * knowledge of career opportunities
- * knowledge of how to learn on an ongoing basis

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KNOWLEDGE

INTERLIBRARY LOAN

ENTRY LEVEL

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**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

INTERLIBRARY LOAN

ENTRY LEVEL

Basic Skills

**** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity**
- * establish rapport with users and colleagues**
- * communicate well by written, verbal and non-verbal means**
- * conduct an interview**
- * conduct meetings with individuals and groups**
- * collect, analyze and interpret data**
- * make decisions and recommendations based on available information**
- supervise staff**
- * work independently and in groups**
- develop criteria for evaluation**

Ability to:

- ** make effective, timely, and well-informed decisions**
- ** isolate and define problems and develop the necessary criteria and action for their solution**
- * manage time effectively**

INTERLIBRARY LOAN

MID LEVEL

Skills Related to Each Specific Activity

**** Skills listed above are developed to a greater extent**

Ability to:

- ** perceive the needs of the organization and not just the library**
- * anticipate long-range needs of library**
- * design systems and procedures to improve library operations**
- * arbitrate and negotiate**

SKILLS

INTERLIBRARY LOAN

SENIOR LEVEL

***** Skills listed above are developed to a greater extent**

Ability to:

***** apply methods of measurement and evaluation**

**** budget and make projections**

***** optimize the use of library resources**

**COMPETENCIES VALIDATED AS BECOMING
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IN THE FUTURE**

SKILLS

INTERLIBRARY LOAN

ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

- * conduct meetings with individuals and groups

Ability to:

- * isolate and define problems and develop the necessary criteria and action for their solution

INTERLIBRARY LOAN

MID LEVEL

Skills Related to Each Specific Activity

Ability to:

- * arbitrate and negotiate

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

A TTITUDES

INTERLIBRARY LOAN

Dispositional Attitudes

Attitudes Toward Institutions

- ** Respect for profession**
- ** Respect for the library**
- * Respect for the parent organization**

Attitudes Toward Other People

Toward Users

- *** Respect users**
- ** Like people in general**
 - * Like to help people**
 - Like to meet people**
- * Like to make others feel comfortable**
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Toward Others in the Workplace

- *** Respect co-workers**
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- ** Willingness to draw upon and share knowledge and experience with others**
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Personal Qualities

- *** Alertness**
 - * Assertiveness**
- ** Compassion/Kindness**
 - * Confidence**
- ** Cheerfulness**
- *** Dependability**
 - * Determination/Tenacity**
 - * Diplomacy**
 - * Emotional stability**
 - * Fairness**
- ** Flexibility/Versatility**
 - * Imagination**
 - * Inquisitiveness**
 - Leadership ability**

ATTITUDES

INTERLIBRARY LOAN

Personal Qualities (cont'd)

- * Neatness
- * Need for achievement
- * Objectivity
- * Open-mindedness
- * Optimism/Positive attitude
- * Organization
- * Patience
- ** Physical endurance
- *** Resourceful
- ** Sensitive/Thoughtful
- * Sense of humor
- ** Sense of ethics
- * Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- ** Willingness to take/accept responsibility
- * Willingness to take initiative
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- ** Desire to learn/try
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- *** Accuracy
- Willingness to get hands dirty
- *** Attention to detail
- Willingness to do clerical tasks
- ** Desire to follow-through
- ** Service orientation
- * Organizational identity
- * Willingness to promote library and its services
- * View of library as part of a larger information environment
- ** View of library as an organization
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense
- ** Curiosity
- * Variety of interests
- * Desire to grow personally
- * Desire to grow professionally
- * Desire to remain current in specific and general subject field
- ** Positive attitude toward job

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ATTITUDES

INTERLIBRARY LOAN

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- * Variety of interests
- * Desire to grow personally
- * Desire to remain current in specific and general subject field

**SPECIAL LIBRARIAN COMPETENCIES
MANAGEMENT**

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

General Administration

1. Work with library/library system director and other section/branch managers to formulate and/or interpret library objectives
2. Prepare written section/branch objectives
3. Coordinate section/branch objectives with those of other sections/branches of the library system
4. Evaluate current activities in terms of the section/branch's objectives
5. Identify required statistics and reports
6. Prepare final version of section's/branch's annual reports and other reports
7. Supervise clerical staff who
 - type correspondence, reports, etc.
 - answer phones
 - sort and route mail
 - maintain section/branch files and records
 - input and maintain payroll data

Planning

8. Maintain an awareness of the current and planned information and service needs of the user community
9. Assess future needs and develop long-range plans
10. Recommend new activities/programs when appropriate

Financial Management

11. Prepare operating and capital budgets, both short- and long-term
12. Justify the section's/branch's budgets
13. Control expenditures and operate within the budgets
14. Establish financial policies and procedures in keeping with the library system's overall financial operations
15. Establish costs for services, if appropriate

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Financial Management (cont'd)

- 16. Supervise charging for services, if appropriate
- 17. Determine the cost of in-house versus contract processing and services
- 18. Supervise the deposit of any funds received

Policies and Procedures

- 19. Review and approve/modify section/branch policies as drafted by senior staff
- 20. Present policies to library/library system director for approval
- 21. Monitor established policies and guidelines
- 22. Revise policies and guidelines as required
- 23. Review and approve/modify procedures recommended by staff

Management of Activities

- 24. Supervise overall operation of the section/branch
- 25. Coordinate section/branch activities with other operations within the library system
- 26. Supervise the establishment of work schedules to ensure adequate staffing of the section/branch
- 27. Supervise the maintenance of adequate production levels, production deadlines and quality control
- 28. Identify activities which could be curtailed if staff reduction and/or budget cuts were required

Systems Analysis and Design

- 29. Perform on-going systems analysis of section/branch activities
- 30. Review and approve/modify record formats and other file design data for section/branch files as recommended by staff
- 31. Work with systems staff/representatives and section/branch staff to resolve problems with operation of automated systems, if applicable

ACTIVITY IES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Facilities, Equipment and Supplies, and Contract Services

32. Work with architects and interior designers to plan section/branch design and layout for new facilities
33. Plan the rearrangement of existing facilities
34. Select furnishings for section/branch
35. Request maintenance of facilities as required
36. Review and approve/modify staff recommendations for acquisition of equipment, forms, supplies and systems
37. Recommend and support acquisition of selected items
38. Arrange for purchase of approved items
39. Maintain inventory listings of furnishings and equipment in section/branch
40. Review and approve/modify final draft of contract-related documentation
41. Designate a staff member to serve as the section's/branch's technical representative for each contract
42. Evaluate contractors' performance

Personnel Management and Staff Development

43. Review staffing and work loads to ensure that employees are properly utilized
44. Prepare final version of job descriptions for entire staff of section/branch
45. Request and justify new positions
46. Initiate staff recruitment after staffing requests are approved
47. Interview and select candidates for positions
48. Ensure that new staff receive proper orientation and on-the-job training
49. Review personnel records of staff

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Personnel Management and Staff Development (cont'd)

50. Approve/modify performance standards as developed by staff
51. Prepare written performance evaluations for entire staff
52. Conduct conferences with individual staff members to discuss performance evaluations and other matters as appropriate
53. Suggest ways in which individual staff members may improve performance and/or become eligible for promotion
54. Approve library-funded training for staff
55. Prepare documentation for awards, grievance actions, separations, etc.
56. Present awards
57. Discipline staff as required
58. Conduct exit interviews with staff
59. Approve leave
60. Approve vacation schedules

Communications

61. Conduct staff meetings
62. Ensure that communication is maintained within the section/branch so that staff will know what is happening in the section/branch, the library system, the advisory groups, the network(s), and in the information world in general
63. Establish and maintain good working relationships within the library system
64. Make preliminary arrangements for cooperative efforts with other sections/branches
65. Represent section/branch or designate representative(s) for joint projects with other areas of the library system

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Marketing and Public Relations

66. Establish and maintain good working relationships with librarians from other libraries in the area
67. Communicate with other libraries regarding any difficulties associated with cooperative activities
68. Join/participate in forming library networks/consortia and support network goals and activities
69. Receive official visitors to the section/branch
70. Arrange for overviews/tours of the section's/branch's operations
71. Coordinate the production of publications/information products by section/branch staff
72. Ensure that documents describing the section/branch and its policies and procedures are up-to-date
73. Approve/make arrangements for advertisement, publication, and distribution of documents/information products produced by section/branch staff

Research and Development

74. Identify problem areas related to the section's/branch's activities/objectives which require further study
75. Arrange for and monitor in-house or contract studies of the problem areas
76. Evaluate the recommendations of the studies
77. Implement new programs/procedures as appropriate

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director/
Library System Director)

General Administration

1. Work with senior institutional administrators to formulate and/or interpret objectives of the library/library system
2. Supervise the preparation of written library/library system objectives
3. Coordinate library/library system objectives with those of other systems within the institution
4. Evaluate current activities in terms of the library's/library system's objectives
5. Identify required statistics and reports
6. Prepare final version of library's/library system's annual reports and other reports
7. Supervise clerical staff who
 - type correspondence, reports, etc.
 - answer phones
 - sort and route mail
 - maintain files and records
 - input and maintain payroll data

Planning

8. Maintain an awareness of the current and planned information and service needs of the user community
9. Assess future needs and develop long-range plans
10. Recommend new activities/programs when appropriate

Financial Management

11. Supervise the preparation of operating and capital budgets, both short- and long-term
12. Justify the library's/library system's budgets to institutional administrators
13. Supervise expenditure control and operation within the budgets

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director/
Library System Director)

Financial Management (cont'd)

14. Establish financial policies and procedures in keeping with the institution's overall financial operations
15. Supervise the establishment of costs for services, if appropriate
16. Supervise charging for services, if appropriate
17. Supervise the determination of the cost of in-house versus contract processing and services
18. Supervise the deposit of funds received by the library/library system

Policies and Procedures

19. Review and approve/modify library/library system policies as drafted by senior staff
20. Present policies to institutional administrators for concurrence
21. Supervise the monitoring of established policies and guidelines
22. Supervise the revision of policies and guidelines as required
23. Review and approve/modify procedures recommended by staff

Management of Activities

24. Supervise overall operation of the library/library system
25. Coordinate library/library system activities with the institution
26. Supervise the establishment of work schedules to ensure adequate staffing of the library/library system
27. Supervise the maintenance of adequate production levels, production deadlines and quality control
28. Identify activities which could be curtailed if staff reduction and/or budget cuts were required

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director/
Library System Director)

Systems Analysis and Design

- 29. Supervise the on-going systems analysis of library/library system activities
- 30. Review and approve/modify file design data for library/library system files as recommended by staff
- 31. Supervise efforts of senior staff to resolve problems with operation of automated systems, if applicable

Facilities, Equipment and Supplies, and Contract Services

- 32. Select and justify locations of new facilities and collections
- 33. Work with architects and interior designers to plan the overall design and layout for new facilities
- 34. Supervise planning for rearrangement of existing facilities
- 35. Supervise selection of furnishings for library facilities
- 36. Supervise maintenance of facilities as required
- 37. Review and approve/modify staff recommendations for acquisition of equipment, forms, supplies and systems
- 38. Justify acquisition of selected items to institutional administrators
- 39. Supervise purchase of approved items
- 40. Supervise maintenance of inventory listings of furnishings and equipment in the library/library system
- 41. Review and approve/modify major contract documentation
- 42. Supervise in-house management of contract activity
- 43. Supervise the evaluation of contractors' performance

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director,
Library System Director)

Personnel Management and Staff Development

44. Supervise staff review of staffing and work loads to ensure that employees are properly utilized
45. Review/prepare final version of job descriptions for senior staff of library/library system and for staff in the director's office
46. Request and justify new positions
47. Supervise staff recruitment after staffing requests are approved
48. Interview and select candidates for senior staff positions and for director's staff
49. Ensure that new staff receive proper orientation and on-the-job training
50. Review personnel records of senior and director's staff
51. Approve/modify performance standards as developed by senior and director's staff
52. Prepare written performance evaluations for senior and director's staff
53. Conduct conferences with individual members of senior and director's staff to discuss performance evaluations and other matters as appropriate
54. Suggest ways in which individual members of senior and director's staff may improve performance and/or become eligible for promotion
55. Approve library-funded training for senior and director's staff
56. Review/prepare documentation for awards, grievance actions, separations, etc.
57. Present awards
58. Discipline senior and director's staff as required
59. Conduct exit interviews with senior and director's staff and other staff, as appropriate
60. Approve leave for senior and director's staff
61. Approve vacation schedules for senior and director's staff

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director/
Library System Director)

Communications

62. Attend staff meetings of senior institution staff as the representative of the library/library system
63. Conduct staff meetings of senior and director's staff
64. Ensure that communication is maintained within the library/library system so that staff will know what is happening in the library, the library system, the advisory groups, the network(s), and in the information world in general
65. Establish and maintain good working relationships within the library/library system and within the sponsoring institution
66. Make preliminary arrangements for cooperative efforts with other libraries/library systems and/or with library/bibliographic networks
67. Represent the library/library system or designate representative(s) for joint projects with other libraries/library systems and/or with library/bibliographic networks

Marketing and Public Relations

68. Market the library/library system and its services to higher level institutional administrators
69. Supervise the marketing of the library/library system and its services to the user community
70. Establish and maintain good working relationships with librarians from other libraries/systems/networks
71. Communicate with other libraries/systems/networks regarding any difficulties associated with cooperative activities
72. Join/participate in forming library networks/consortia and support network goals and activities
73. Receive official visitors to the library/library system
74. Supervise arrangements for overviews/tours of the library/library system

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Library Director/
Library System Director)

Marketing and Public Relations (cont'd)

- 75. Supervise the coordination of production of publications/information products by library/library system
- 76. Ensure that documents describing the library/library system and its policies and procedures are up-to-date
- 77. Approve/modify/recommended arrangements for advertisement, publication, and distribution of documents/information products produced by library/library system

Research and Development

- 78. Identify and/or review problem areas related to the library's/library system's activities/objectives which require further study
- 79. Review, approve/modify in-house or contract studies of the problem areas
- 80. Review and approve/modify evaluations by senior staff of studies' recommendations
- 82. Approve and supervise implementation of new programs/procedures as appropriate

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

MANAGEMENT

SENIOR LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- ** knowledge of definition, structure, and formats of information
- *** knowledge of alternative approaches to the organization of information
- *** knowledge of alternative approaches to retrieval of management information
- *** knowledge of alternative approaches to information management
- *** knowledge of available and emerging information technologies and their applications
- ** knowledge of completed and ongoing research in the field and its applicability to practice
- ** knowledge of career opportunities
- *** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- *** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- *** knowledge of the variety of work settings and their organizational structures
- *** knowledge of the functions performed within the various work settings and the services and products offered
- *** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the management function, the range of services and products offered (both actual and potential)
- *** knowledge of the activities that are required to offer the services and produce the products
- *** knowledge of the various resources that are necessary to support the activities
- *** knowledge of management tools and sources of information
- *** knowledge of management methods and techniques
- *** knowledge of performance expected and how it can be measured
- *** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

MANAGEMENT

SENIOR LEVEL

Knowledge of how to do work

- ** knowledge of how to perform the various activities
- *** knowledge of how to use the management tools and sources of management information
- *** knowledge of how to apply the management methods and techniques
- *** knowledge of personnel procedures
 - * knowledge of the operations of other sections in the library and how they related to management
 - * knowledge of available vendor-supplied systems, services and products to support management
- ** knowledge of the contracting process, both in general and within the organization
- *** knowledge of evaluation methods and techniques to evaluate systems, services and products
- ** knowledge of public relations techniques
- ** knowledge of statistical description, analysis, interpretation and presentation
- *** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
- *** knowledge of cost analysis and interpretation methods
- *** knowledge of methods of resource allocation
- *** knowledge of standards, measures and methods for evaluating personnel
- ** knowledge of alternative management structures and their implications for the operation of the library
- ** state-of-the-art knowledge of library research and practice

Knowledge of the organization served and its library (or information center)

- *** knowledge of the mission, goals and objectives of the organization served
- *** knowledge of the structure of the organization and the role of the library (or information center) within the organization
- *** knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
- *** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- *** knowledge of the users' information needs and requirements
- ** knowledge of the collection, and of related collections

**COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE**

KNOWLEDGE

MANAGEMENT

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- * knowledge of the collection, and of related collections

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

MANAGEMENT

SENIOR LEVEL

Basic Skills

***** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity**
- *** establish rapport with users and colleagues**
- *** communicate well by written, verbal and non-verbal means**
- ** conduct an interview**
- *** conduct meetings with individuals and groups**
- *** collect, analyze and interpret data**
- *** make decisions and recommendations based on available information**
- *** supervise staff**
- *** work independently and in groups**
- *** develop criteria for evaluation**

Ability to:

- *** make effective, timely, and well-informed decisions**
- *** isolate and define problems and develop the necessary criteria and action for their solution**
- *** manage time effectively**

Skills Related to Each Specific Activity

Ability to:

- *** perceive the needs of the organization and not just the library**
- *** anticipate long-range needs of library**
- ** design systems and procedures to improve library operations**
- *** arbitrate and negotiate**
- *** apply methods of measurement and evaluation**
- *** budget and make projections**
- *** optimize the use of library resources**

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SKILLS

MANAGEMENT

SENIOR LEVEL

Skills Related to Specific Activities

Ability to:

- * manage time effectively**

Skills Related to Each Specific Activity

Ability to:

- * perceive the needs of the organization and not just the library**
- * anticipate long-range needs of library**

**COMPETENCIES VALIDATED AS
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ATTITUDES

MANAGEMENT

Dispositional Attitudes

Attitudes Toward Institutions

- *** Respect for profession**
- *** Respect for the Library**
- *** Respect for the parent organization**

Attitudes Toward Other People

Toward Users

- *** Respect users**
 - * Like people in general**
 - * Like to help people**
 - * Like to meet people**
 - Like to make others feel comfortable**
 - * Sensitive to others' needs**

Toward Others in the Workplace

- *** Respect co-workers**
- *** Like to work with others/as a team**
 - ** Like to work on own**
- *** Willingness to draw upon and share knowledge and experience with others**
- *** Supportive of co-workers**
- *** Enjoy managing/supervising others**

Personal Qualities

- ** Alertness**
- ** Assertiveness**
 - * Compassion/Kindness**
- *** Confidence**
 - * Cheerfulness**
- *** Dependability**
 - ** Determination/Tenacity**
- *** Diplomacy**
 - ** Emotional stability**
- *** Fairness**
- *** Flexibility/Versatility**
- *** Imagination**
 - ** Inquisitiveness**
- *** Leadership ability**

ATTITUDES

MANAGEMENT

Personal Qualities (cont'd)

- * Neatness
- ** Need for achievement
- *** Objectivity
- *** Open-mindedness
- ** Optimism/Positive attitude
- *** Organization
- * Patience
- * Physical endurance
- ** Resourceful
- * Sensitive/Thoughtful
- * Sense of humor
- *** Sense of ethics
- ** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- *** Willingness to take/accept responsibility
- *** Willingness to take initiative
 - * Willingness to respond to authority, apply and follow policy
- ** Desire to learn/try
- ** Willingness to fail
- *** Willingness to ask questions
- *** Desire to work to best of ability
- ** Responsiveness to time constraints
- *** Accuracy
 - * Willingness to get hands dirty
- Attention to detail
- *** Desire to follow-through
 - * Service orientation
- *** Organizational identity
- *** Willingness to promote library and its services
- *** View of library as part of a larger information environment
- *** View of library as an organization
- *** Ability to see broad picture
- *** Ability to sacrifice short-term gains for long-term goals
- *** Political sense
 - * Curiosity
 - * Variety of interests
 - * Desire to grow personally
- *** Desire to grow professionally
- *** Desire to remain current in specific and general subject field
- *** Positive attitude toward job

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ATTITUDES

MANAGEMENT

Dispositional Attitudes

Attitudes Toward Other People

Toward Users

- * Like to help people
- * Like to meet people

Personal Qualities

- * Dependability
- * Fairness
- * Flexibility/Versatility
- * Imagination
- * Leadership ability
- * Physical endurance
- * Sense of humor

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- * Organizational identity
- * Willingness to promote library and its services
- * View of library as part of a larger information environment
- * Ability to see broad picture
- * Political sense
- * Variety of interests
- * Desire to grow personally
- * Positive attitude toward job

SPECIAL LIBRARIAN COMPETENCIES

REFERENCE

ACTIVITIES

REFERENCE

ENTRY LEVEL

Solicited Searches

1. Interview users to evaluate information requirements, and determine budgetary and time constraints, etc.
2. Counsel clients on specifying information requirements
3. Develop and implement strategy for obtaining, evaluating, and packaging information and data to meet users' needs
4. Select search methods (e.g., online and/or manual)
5. Determine appropriate source (e.g., databases, printed publications, experts, etc.)
6. Conduct searches, using proper subject terms for sources selected
7. Review retrieval output for relevancy
8. Provide information for users in the form of references or source documents
9. Translate titles and abstracts
10. Refer users to higher-level reference staff, as appropriate
11. Refer users to other information services, as appropriate

Unsolicited Searches

12. Perform online searches according to SDI profiles.

Other

13. Answer ready reference questions
14. Instruct users in reference methods, sources, services and policies
15. Alert users to non-print and in-house developed sources of information
16. Perform bibliographic verification as required
17. Recommend acquisition of materials for the reference and general collections
18. Recommend materials/data for inclusion in reference source files (vertical file; in-house indexes)

ACTIVITIES

REFERENCE

ENTRY LEVEL

Other (cont'd)

19. Supervise orderly maintenance of the reference room and re-shelving/re-filing of reference materials
20. Maintain a record of reference seaching statistics
21. Maintain a record of financial data (funds received/charged to organizational depatments in payment for computerized retrieval, packaged literature searches and other products, or services for which charging may be authorized)
22. Conduct library business by phone, when appropriate
23. Write memos and letters, as required
24. Prepare an information package for users to describe reference services and policies
25. Prepare manuals of procedures
26. Make recommendations to the section manager for improvement in operations of the section and for improvement in services to users
27. Attend and participate in staff meetings
28. Provide an overview of the operations of the unit/section to visitors, as requested
29. Supervise technicians and other paraprofessional staff
30. Work to develop "esprit de corps" among staff supervised
31. Assist section manager in writing job descriptions for self and for staff supervised
32. Assist section manager in developing performance standards for self and for staff supervised
33. Assist manager in the review and performance evaluation of staff supervised
34. Assist in the selection of new technicians and paraprofessionals
35. Keep abreast of new and changing reference sources, services and tools

ACTIVITIES

REFERENCE

ENTRY LEVEL

Other (cont'd)

- 36. Keep abreast of new and developing technologies applicable to reference searching
- 37. Attend professional meetings and prepare reports for dissemination to staff
- 38. Develop professional contacts both within and outside the library

REFERENCE

MID LEVEL

Solicited Searches

- 39. Perform more complex searches
- 40. Provide additional information for users (e.g. in the form of critical annotations, abstracts, analytical reports, etc.)

Unsolicited Searches

- 41. Assist in developing broad-scope, published literature searches with executive analyses, resulting from anticipation and recognition of other information needs
- 42. Identify topics and develop search strategies
- 43. Conduct searches
- 44. Evaluate search results
- 45. Prepare searches for publication
- 46. Distribute published literature searches

Other

- 47. Work with users to develop SDI profiles
- 48. Interact with users to suggest changes in SDI profiles
- 49. Supervise the maintenance of the file of SDI profiles
- 50. Organize and maintain reference source files (vertical file, in-house indexes)

ACTIVITIES

REFERENCE

MID LEVEL

Other (cont'd)

51. Inform organizational staff of books and articles related to their interests
52. Schedule and supervise shelf reading of the reference collection
53. Make preliminary selection of forms and/or develop draft record formats for all reference files and operations
54. Identify and evaluate commercially available information services
55. Assess performance of existing equipment/systems/services used in reference and investigate capabilities of other equipment/systems/services
56. Recommend acquisition of new/additional equipment/systems/services
57. Train staff in operation and in-house maintenance of equipment/systems/services
58. Supervise in-house operation and maintenance of equipment/systems/services
59. Gather information for maintenance contracts on equipment/systems
60. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
61. Evaluate contractors' proposals
62. Train and supervise entry level staff
63. Assist in the selection of new professional staff
64. Write articles for professional journals/newsletters when appropriate

REFERENCE

SENIOR LEVEL

Solicited Searches

65. Review solicited searches performed by others and suggest additional search strategies as appropriate
66. Refer users to subject experts as appropriate

ACTIVITIES

REFERENCE

SENIOR LEVEL

Unsolicited Searches

- 67. Review unsolicited searches performed by others and suggest additional search strategies as appropriate
- 68. Prepare executive analyses for published searches
- 69. Arrange for publication
- 70. Develop a public relations strategy for marketing the publication
- 71. Develop distribution list
- 72. Develop announcement of publication

Other

- 73. Function as a technical expert in all matters relating to reference service
- 74. Interact with colleagues and subject experts in identifying unrecorded/unindexed sources of information and data, and report to staff
- 75. Review and weed the reference collection on a regular basis
- 76. Review and weed reference source files on a regular basis
- 77. Work with interlibrary loan and selection staff members to analyze library resources in the area and to make recommendations concerning the degree to which duplication of reference collections should occur
- 78. Work with selection staff to compile lists of reference books and standard works which comprise a basic collection in each major subject area. New editions of these materials are acquired when published
- 79. Work with selection staff to select materials for a small collection to support organizational staff who may be located in a remote facility
- 80. Draft reference service procedures and policies; draft revisions as required
- 81. Flowchart and document reference service procedures
- 82. Assist section manager in on-going systems analysis of the section
- 83. Analyze statistics and prepare draft statistical reports

ACTIVITIES

REFERENCE

SENIOR LEVEL

Other (cont'd)

- 84. Develop charging strategies
- 85. Analyze financial data and prepare draft financial reports
- 86. Handle deposit of funds/assessment of charges
- 87. Supervise mid level staff
- 88. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

REFERENCE

ENTRY LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- * knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- *** knowledge of definition, structure, and formats of information
- * knowledge of alternative approaches to the organization of information
- ** knowledge of alternative approaches to retrieval of information
- * knowledge of alternative approaches to information management
- * knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- * knowledge of career opportunities
- *** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the reference function, the range of services and products offered (both actual and potential)
- *** knowledge of the activities that are required to offer the services and produce the products
- * knowledge of the various resources that are necessary to support the activities
- *** knowledge of reference/referral tools and sources of information
- *** knowledge of reference/referral methods and techniques
- ** knowledge of performance expected and how it can be measured
- ** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

REFERENCE

ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities
- *** knowledge of how to use the reference/referral and other sources
- *** knowledge of how to apply the reference/referral methods and techniques
- knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- ** knowledge of the mission, goals and objectives of the organization served
- ** knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- ** knowledge of the policies and procedures relevant to the library (or information center)
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- *** knowledge of the users' information needs and requirements
- *** knowledge of the collection, and of related collections

REFERENCE

MID LEVEL

- *** greater depths of knowledge specified above
- knowledge of the operations of other sections in the library and how they relate to reference
- *** knowledge of available vendor-supplied systems, services and products to support reference
- * knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products
- ** knowledge of public relations techniques

KNOWLEDGE

REFERENCE

SENIOR LEVEL

- *** greater depth of knowledge specified above
- ** knowledge of statistical description, analysis, interpretation and presentation
- *** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
- ** knowledge of cost analysis and interpretation methods
- *** knowledge of methods of resource allocation
- *** knowledge of standards, measures and methods for evaluating personnel
- ** knowledge of alternative management structures and their implications for the operation of the library
- *** state-of-the-art knowledge of library research and practice

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- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- * knowledge of the reference function, the range of services and products offered (both actual and potential)
- * knowledge of the activities that are required to offer the services and produce the products
- ** knowledge of the various resources that are necessary to support the activities
- * knowledge of reference/referral tools and sources of information
- * knowledge of reference/referral methods and techniques
- * knowledge of performance expected and how it can be measured
- * knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

REFERENCE

ENTRY LEVEL

Knowledge of how to do work

- * knowledge of how to perform the various activities
- * knowledge of how to use the reference/referral and other sources
- * knowledge of how to apply the reference/referral methods and techniques
- * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- * knowledge of the mission, goals and objectives of the organization served
- * knowledge of the structure of the organization and the role of the library (or information center) within the organization
- ** knowledge of the various projects and key personnel within the organization
- * knowledge of the policies and procedures relevant to the library (or information center)
- * knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- ** knowledge of the users' information needs and requirements
- * knowledge of the collection, and of related collections

REFERENCE

MID LEVEL

- * greater depths of knowledge specified above
- * knowledge of the operations of other sections in the library and how they relate to reference
- ** knowledge of available vendor-supplied systems, services and products to support reference
- * knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products
- ** knowledge of public relations techniques

KNOWLEDGE

REFERENCE

SENIOR LEVEL

- * greater depths of knowledge specified above
- ** knowledge of statistical description, analysis, interpretation and presentation
- * knowledge of the costs associated with library resources (materials, personnel, space, etc.)
- * knowledge of cost analysis and interpretation methods
- * knowledge of methods of resource allocation
- * knowledge of standards, measures and methods for evaluating personnel
- * knowledge of alternative management structures and their implications for the operation of the library
- * state-of-the-art knowledge of library research and practice

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

SKILLS

REFERENCE

ENTRY LEVEL

Basic Skills

***** literacy, numeracy, cognitive, analytical, communications, etc.**

Skills Related to Specific Activities

Ability to:

- * perform each activity
- ** establish rapport with users and colleagues
- *** communicate well by written, verbal and non-verbal means
- ** conduct an interview
- * conduct meetings with individuals and groups
- * collect, analyze and interpret data
- ** make decisions and recommendations based on available information
- * supervise staff
- * work independently and in groups
- * develop criteria for evaluation

Ability to:

- ** make effective, timely, and well-informed decisions
- * isolate and define problems and develop the necessary criteria and action for their solution
- ** manage time effectively

REFERENCE

MIL LEVEL

Skills Related to Each Specific Activity

***** Skills listed above are developed to a greater extent**

Ability to:

- ** perceive the needs of the organization and not just the library
- ** anticipate long-range needs of library
- ** design systems and procedures to improve library operations
- arbitrate and negotiate

SKILLS

REFERENCE

SENIOR LEVEL

*** Skills listed above are developed to a greater extent

Ability to:

*** apply methods of measurement and evaluation

** budget and make projections

*** optimize the use of library resources

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**COMPETENCIES VALIDATED AS
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ATTITUDES

REFERENCE

Dispositional Attitudes

Attitudes Toward Institutions

- *** Respect for profession**
- ** Respect for the library**
- ** Respect for the parent organization**

Attitudes Toward Other People

Toward Users

- *** Respect users**
- ** Like people in general**
- *** Like to help people**
 - * Like to meet people**
 - * Like to make others feel comfortable**
 - * Sensitive to others' needs**

Toward Others in the Workplace

- *** Respect co-workers**
 - * Like to work with others/as a team**
 - * Like to work on own**
- ** Willingness to draw upon and share knowledge and experience with others**
- ** Supportive of co-workers**
 - * Enjoy managing/supervising others**

Personal Qualities

- *** Alertness**
 - * Assertiveness**
 - * Compassion/Kindness**
- ** Confidence**
 - * Cheerfulness**
- *** Dependability**
- ** Determination/Tenacity**
- ** Diplomacy**
- ** Emotional stability**
 - * Humanness**
- ** Flexibility/Versatility**
- *** Imagination**
- ** Inquisitiveness**
- Leadership ability**

ATTITUDES

REFERENCE

Personal Qualities (cont'd)

- Neatness
- * Need for achievement
- ** Objectivity
- * Open-mindedness
- * Optimism/Positive attitude
- ** Organization
- * Patience
- * Physical endurance
- *** Resourceful
- * Sensitive/Thoughtful
- * Sense of humor
- ** Sense of ethics
- * Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

- *** Willingness to take/accept responsibility
- ** Willingness to take initiative
- * Willingness to respond to authority, apply and follow policy
- *** Desire to learn/try
- * Willingness to fail
- *** Willingness to ask questions
- *** Desire to work to best of ability
- ** Responsiveness to time constraints
- *** Accuracy
- * Willingness to get hands dirty
- ** Attention to detail
- Willingness to do clerical tasks
- ** Desire to follow-through
- *** Service orientation
- * Organizational identity
- ** Willingness to promote library and its services
- ** View of library as part of a larger information environment
- ** View of library as an organization
- * Ability to see broad picture
- * Ability to sacrifice short-term gains for long-term goals
- * Political sense
- ** Curiosity
- * Variety of interests
- * Desire to grow personally
- ** Desire to grow professionally
- ** Desire to remain current in specific and general subject field
- *** Positive attitude toward job

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ATTITUDES

REFERENCE

Dispositional Attitudes

Attitudes Toward Institutions

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- - * Like children
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 - * Like to meet people
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Toward Others in the Workplace

- * Enjoy managing/supervising others

Personal Qualities

- * Confidence
- * Fairness
- * Optimism/Positive attitude

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Individual should demonstrate:

- * Willingness to do clerical tasks
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- * Desire to grow personally
- * Desire to gain current in specific and general subject field

SPECIAL LIBRARIAN COMPETENCIES
SERIALS CONTROL

ACTIVITIES

SERIALS CONTROL

ENTRY LEVEL

Verification and Ordering

1. Receive citations for selected serials/numbered series from the acquisitions section
2. Receive citations from organization staff for office copy subscriptions
3. Receive issues/parts of serials/numbered series from the acquisitions section which were received on approval, as gifts, etc.
4. Develop a working knowledge of the library's collection development policies and guidelines
5. Refer questionable citations/items to supervisor for selection review
6. Determine source of procurement for each title ordered (jobber, direct, gift, exchange, etc.)
7. Supervise ordering of serials/numbered series:
 - verify and locate additional bibliographic data as required; refer problems to supervisor
 - search serial records to determine if title is already on order
 - for older materials/citations, search library's catalog(s) to determine if entire series is in the collection already
 - prepare serial records for titles to be ordered
 - prepare subscription orders, including the proper "ship to" addresses for office copies
 - prepare purchase orders, if required
 - prepare order documentation for mailing
 - forward order documentation to the acquisitions section for fiscal control and mailing
 - claim outstanding orders (no issues received)
 - claim missing issues
 - cancel orders, as required
 - re-issue orders to different sources as required
 - order replacement copies of damaged/lost issues
 - process renewals
 - maintain a statistical record of ordering operations
8. Search for trade and non-trade bibliographic information that technicians are unable to locate; refer problems to higher level staff, as appropriate

ACTIVITIES

SERIALS CONTROL

ENTRY LEVEL

Receipt Processing

9. Supervise receipt processing of serials/numbered series:

- sort incoming items, if appropriate
- search serials file to locate the records
- update records with receipt of individual issues/numbers/parts
- flag records for gap filling
- record/affix locator data on each piece (classification number, special collection symbol, etc.)
- mark materials with the library's identification
- affix security labels
- place issues in special binders, if appropriate
- affix routing slips or photocopy tables of contents and send to proper staff, if appropriate
- place new serial titles on the appropriate truck for delivery to the cataloging section
- place items which have title changes on the truck for cataloging
- place new issues for the reading room on the appropriate truck
- place issues for the stacks on the appropriate trucks
- deliver trucks to proper locations
- annotate receipt on packing slips/invoice copies, if received, and forward to the acquisitions section
- annotate packing slips/invoice copies for damaged/imperfect or unwanted hardbound series; forward documentation and pieces to the acquisitions section for processing
- place surplus materials in specified area to await proper disposal by the acquisitions section
- maintain record of receipt processing statistics

10. Assign processing priorities to new serial titles and to other series requiring update of cataloging records

File Maintenance

11. Supervise creation and maintenance of serial records:

- input records for library and office copies ordered
- update records with data re: cancellations, reissues, claims, and gap filling
- update records with shelving location data for newly-cataloged titles
- update records with data re: change in frequency, change of title, change in publisher, cessation, change of shelving location, change in addressee for routing piece/table of contents

ACTIVITIES

SERIALS CONTROL

ENTRY LEVEL

File Maintenance

11. Supervise creation and maintenance of serial records (cont'd):

- input new records for newly changed titles
- update records with binding control data if serial records are automated
- input cross reference records as required
- remove records from the active file when appropriate
- delete records when appropriate
- maintain statistical records of file creation and maintenance operations

12. Supervise the forwarding of correspondence re: cessation/completion of series to the cataloging section following maintenance of serial records

Other

13. Handle problems related to ordering and receipt processing of serials/numbered series and to overall maintenance of the serial records; refer problems to higher level staff, as appropriate

14. Conduct library business by phone, when appropriate

15. Write memos and letters, as required

16. Prepare manuals of procedures

17. Make recommendations to the section manager for improvement in operations of the unit/section

18. Attend and participate in staff meetings

19. Provide an overview of the operations of the unit/section to visitors, as requested

20. Supervise technicians and other paraprofessional staff

21. Work to develop "esprit de corps" among staff supervised

22. Assist section manager in writing job descriptions for self and for staff supervised

23. Assist section manager in developing performance standards for self and for staff supervised

ACTIVITIES

SERIALS CONTROL

ENTRY LEVEL

Other (cont'd)

24. Assist manager in the review and performance evaluation of staff supervised
 25. Assist in the selection of new technicians and paraprofessionals
 26. Keep abreast of developments in the information field, library practice, or legislation that affect library processing and control of serials/numbered series
 27. Attend professional meetings and prepare reports for dissemination to staff
 28. Develop professional contacts both within and outside the library
-

SERIALS CONTROL

MID LEVEL

Verification and Ordering

29. Develop procedures for the verification and ordering of serials/numbered series
30. Supervise the maintenance of an address file of procurement sources for serials
31. Draft form letters for ordering serials, claiming/cancelling orders, claiming missing issues, ordering lost/damaged issues, etc.
32. Work with the acquisitions section to schedule purchases of serials in order to operate within the budget
33. Work with the acquisitions section to develop procedures for the handling of the final steps in serials ordering and invoice processing
34. Identify sources for filling gaps when the required issues are unavailable from the publishers
35. Coordinate gap filling as gaps are reported by collection maintenance staff as part of binding preparation and inventory operations

ACTIVITIES

SERIALS CONTROL

MID LEVEL

Receipt Processing

36. Develop procedures for receipt processing of serials/numbered series

File Maintenance

37. Develop procedures for maintenance of the serial records
39. Make preliminary selection of forms and/or develop draft record formats for all serial record files
39. Work with collection maintenance staff to develop procedures and record formats for including binding control data in automated serial records

Fiscal Control

40. Together with the acquisitions section, work with the contract and/or purchasing department(s) of the parent organization to identify unique requirements and develop draft procedures for purchasing serials and services (e.g., open ended subscriptions, dealer check-in)
41. Work with the acquisitions section to develop procedures for proper packing slip/invoice handling and receipt certification by serial records staff
42. Assist acquisitions section in resolving any problems related to payment for serials
43. Remain aware of the expenditures and balances in the serials account(s); notify the section manager of situations which may require special action
44. Project budget requirements for purchasing serials for the new fiscal year

Other

45. Assess performance of existing equipment/systems used in serial records and investigate capabilities of other equipment/systems
46. Recommend acquisition of new/additional equipment/systems
47. Train staff in operation and in-house maintenance of equipment/systems
48. Supervise in-house operation and maintenance of equipment/systems
49. Gather information for maintenance contracts on equipment/systems

ACTIVITIES

SERIALS CONTROL

MID LEVEL

Other (cont'd)

- 50. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
 - 51. Evaluate contractors' proposals
 - 52. Train and supervise entry level staff
 - 53. Assist in the selection of new professional staff
 - 54. Write articles for professional journals/newsletters when appropriate
-

SERIALS CONTROL

SENIOR LEVEL

Selection

- 55. Review items identified by staff as being of questionable suitability for the collection; concur with the selections and/or refer the remaining questionable items to senior acquisitions staff for review
- 56. Work with senior acquisitions staff to formulate draft selection policies for serials/numbered series
- 57. Work with senior acquisitions staff to prepare draft selection guidelines for serials/numbered series to be used by selection staff as an aid in interpreting selection policies
- 58. Contact organizational staff concerning the advisability of purchasing expensive serials for office collections versus placing them in the library's collection
- 59. Coordinate the annual review by organizational staff of the list of serials/numbered series currently acquired for the library's collection(s)
- 60. Coordinate the annual review by organizational staff of the list of serial titles which they currently receive as office copies, on routing and/or as photocopied tables of contents

Verification and Ordering

- 61. Select and maintain an up-to-date collection of aids to bibliographic verification of serials data

ACTIVITIES

SERIALS CONTROL

SENIOR LEVEL

Receipt Processing

62. Work with senior acquisitions and cataloging staff members to identify processing priorities for various categories of serials and to draft guidelines for priority assignment

Other

63. Function as a technical expert in all matters related to processing of serials/numbered series
64. Interview dealers' representatives to learn about the particular services they offer
65. Identify dealers who have a good performance record in supplying irregular serials, congress/conference proceedings, and other series which are difficult to acquire on subscription
66. Assist the section manager in negotiating with dealers' representatives to obtain the required level of service in acquiring and/or processing serials
67. Evaluate dealers' performance and report to section manager
68. Work with interlibrary loan and cataloging section staff members to produce and/or update the library's serials holding list
69. Draft serials records procedures and policies; draft revisions as required
70. Flowchart and document serial records procedures
71. Assist section manager in on-going systems analysis of the section
72. Analyze serials processing statistics and prepare draft statistical reports
73. Train and supervise mid level staff
74. Function as section manager in his/her absence

**COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE**

KNOWLEDGE

SERIALS CONTROL

ENTRY LEVEL

Basic knowledge

- *** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
- * knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- ** knowledge of definition, structure, and formats of information
- ** knowledge of alternative approaches to the organization of information
- * knowledge of alternative approaches to retrieval of information
- ** knowledge of alternative approaches to information management
- * knowledge of available and emerging information technologies and their applications
- knowledge of completed and ongoing research in the field and its applicability to practice
- knowledge of career opportunities
- *** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- * knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- * knowledge of the variety of work settings and their organizational structures
- * knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- *** knowledge of the serials control function, the range of services and products offered (both actual and potential)
- *** knowledge of the activities that are required to offer the services and produce the products
- *** knowledge of the various resources that are necessary to support the activities
- *** knowledge of serials control tools and sources of bibliographic information
- *** knowledge of serials control methods and techniques
- *** knowledge of performance expected and how it can be measured
- * knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

SERIALS CONTROL

ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities
- *** knowledge of how to use the serials control tools and sources of bibliographic information
- ** knowledge of how to apply the serials control methods and techniques
- * knowledge of personnel procedures

Knowledge of the organization served and its library (or information center)

- *** knowledge of the mission, goals and objectives of the organization served
- * knowledge of the structure of the organization and the role of the library (or information center) within the organization
- * knowledge of the various projects and key personnel within the organization
- *** knowledge of the policies and procedures relevant to the library (or information center)
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- ** knowledge of the users' information needs and requirements
- * knowledge of the collection, and of related collections

SERIALS CONTROL

MID LEVEL

- *** greater depths of knowledge specified above
- *** knowledge of the operations of other sections in the library and how they relate to serials control
- *** knowledge of available vendor-supplied systems, services and products to support serials control
- *** knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

SERIALS CONTROL

SENIOR LEVEL

- *** greater depths of knowledge specified above
 - * knowledge of public relations techniques
- ** knowledge of statistical description, analysis, interpretation and presentation
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SENIOR LEVEL

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SKILLS

SERIALS CONTROL

ENTRY LEVEL

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Ability to:

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ATTITUDES

SERIALS CONTROL

Dispositional Attitudes

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ATTITUDES

SERIALS CONTROL

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ATTITUDES

SERIALS CONTROL

Dispositional Attitudes

Attitudes Toward Other People

Toward Users

- * Like to help people
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- * Like to make others feel comfortable

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- * Assertiveness
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